



# Pacific Coast Academy

## Regular Scheduled Board Meeting

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### Date and Time

Monday August 14, 2023 at 6:00 PM PDT

### Location

Pacific Coast Academy Office: 13915 Danielson St. #200, Poway, CA 92064

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### Agenda

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>6:00 PM</b>
<b>A.</b> Call the Meeting to Order		Benjamin Fung	1 m
<b>B.</b> Roll Call of Board Members		Benjamin Fung	1 m
<b>C.</b> Approval of Agenda	Vote	Benjamin Fung	1 m
<b>D.</b> Public Comments			
<b>E.</b> Brown Act Training and Legislative Updates		Jennifer McQuarrie	90 m
<b>II. Closed Session</b>			<b>7:33 PM</b>
<b>A.</b> Conference with Legal Counsel – Anticipated Litigation (One Case) § 54956.9	FYI		10 m
<b>III. Other Business</b>			<b>7:43 PM</b>

	Purpose	Presenter	Time
<b>A.</b> Executive Director's Report	FYI	Krystin Demofonte	10 m
<b>B.</b> Proposal for PCA Systems Development	Vote	Shari Erlendson	10 m
<b>IV. Finance</b>			<b>8:03 PM</b>
<b>A.</b> Fund Balance Reserve Policy	Vote	Shari Erlendson	5 m
<b>V. Consent Agenda</b>			<b>8:08 PM</b>
<p>The items below form our consent agenda. The items are considered by the Executive Director to be of a routine nature and are acted on with one motion. Any recommendation may be removed at the request of any Board Member and placed under new and/or unfinished business. The last item in this section is a single vote to approve the items en masse.</p>			
<b>A.</b> Approve Minutes	Approve Minutes		
Approve minutes for Regular Scheduled Board Meeting on June 28, 2023			
<b>B.</b> 2023-2024 Employee Handbook			
<b>C.</b> 2023-2024 Stipend Chart			
<b>D.</b> EL Master Plan			
<b>E.</b> Promotion, Acceleration and Retention Policy			
<b>F.</b> Invoices over \$100,000			
<b>G.</b> Approve Consent Agenda			1 m
This Is The Vote To Approve The Consent Agenda Items.			
<b>VI. Closing Items</b>			<b>8:09 PM</b>
<b>A.</b> Announcement of Next Scheduled Meeting- September 14 at 6:00pm	FYI	Benjamin Fung	1 m
<b>B.</b> Adjourn Meeting	Vote		

Prepared By:  
Jennifer Faber

Noted By:

Board Secretary

Public comment rules: Members of the public may address the Board on agenda or non-agenda items. Please communicate orally your desire to address the board when the board asks for public comments. Speakers may be called in the order that requests are received. We ask that comments are limited to 2 minutes each, with no more than 15 minutes per single topic so that as many people as possible may be heard. If a member of the public utilizes a translator to address the board, those individuals are allotted 4 minutes each. If the board utilizes simultaneous translation equipment in a manner that allows the board to hear the translated public testimony simultaneously, those individuals are allotted 2 minutes each. By law, the Board is allowed to take action only on items on the agenda. The Board may, at its discretion, refer a matter to school staff or calendar the issue for future discussion.

Note: Pacific Coast Academy Governing Board encourages those with disabilities to participate fully in the public meeting process. If you need a disability-related modification or accommodation, including auxiliary aids or services, to participate in the public meeting, please contact the Pacific Coast Academy Office at [\(619\) 749-1928](tel:6197491928) at least 48 hours before the scheduled board meeting so that we may make every reasonable effort to accommodate you. (Government Code § 54954.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. § 12132)).

# Coversheet

## Brown Act Training and Legislative Updates

<b>Section:</b>	I. Opening Items
<b>Item:</b>	E. Brown Act Training and Legislative Updates
<b>Purpose:</b>	FYI
<b>Submitted by:</b>	
<b>Related Material:</b>	Brown Act and Legislative Update August 2023.ppt



# Brown Act and Legislative Update

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**PRESENTED BY: JENNIFER MCQUARRIE**  
**THE LAW OFFICES OF JENNIFER MCQUARRIE**  
**[MCQUARRIELAW@GMAIL.COM](mailto:MCQUARRIELAW@GMAIL.COM)**  
**805-252-1080**



# Workshop Goals

2

- ❧ **Overview of Brown Act**
- ❧ **Cover new and pending legislation and regulations affecting NCB charter schools**



# What is the Brown Act?

3

- ❧ Ralph M. Brown Act (CA Gov. Code sections 54950, et seq.)
- ❧ Open meeting requirement for local legislative bodies
- ❧ Includes, among other things:
  - Notice
  - Agenda
  - Public comment
  - Closed sessions
- Useful guide available on Attorney General's Website  
[www.oag.ca.gov](http://www.oag.ca.gov)



# Brown Act Triggers

4

- ❧ Who: Local agencies and legislative bodies
  - Quorum of Pacific Coast Academy's governing board (and applicable subsidiary bodies)
- ❧ What: "Meetings"



# What is a Meeting?

5

## ∞ Broadly defined

- Congregation of board majority at the same time and place to hear, discuss or deliberate upon any item within its subject matter jurisdiction
- Includes collective acquisition and exchange of facts before making a decision
- Includes informal and inadvertent meetings



# What is a Meeting?

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- **Serial meetings prohibited**
  - **Board majority uses**
    - ✓ direct communication
    - ✓ personal intermediaries
    - ✓ technology and social media
  - **To discuss, deliberate or take action or develop collective concurrence for an item to be decided by the board**
  - **Prohibition does not prevent employee/official from engaging in separate conversations or communications with board members to answer questions/provide information**
    - ✓ So long as does not communicate to members the comments or position of other board members



# Social Media

7

- **Board members are not prevented from engaging in separate conversations or communications on an internet-based social media platform to answer questions, provide information to the public, or to solicit information from the public**
  - **Majority of members do not use the social media platform to discuss among themselves business of a specific nature that is within the subject matter jurisdiction**
  - **Board member shall not respond directly to any communication on social media within smj that is made, posted or shared by another board member**



# Compliance - Notice

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## ☞ Three types of meetings:

- Regular meetings

- ✓ Usually designated by resolution or bylaws
- ✓ 72-hours notice

- Special meetings

- ✓ Called at any time (presiding officer or board majority)
- ✓ 24-hours notice

- Emergency meetings

- ✓ Very rare
- ✓ 1-hour notice to media outlets that previously requested notice





# Compliance - Agenda

9

- Regular and Special Meetings: Content
  - Time/location, including any teleconference locations
  - Brief general description of each item of business to be transacted or discussed
    - ✓ Including closed session matters (further discussion later in slides)
    - ✓ Need not exceed 20 words
  - Public comment rules (recommended)
  - Americans with Disabilities Act accommodation info
  - If it's not on the agenda, cannot be discussed



# Compliance – Limits at Special Meetings

10

- ❧ Salaries, salary schedules, compensation in the form of fringe benefits of high level employees may not be discussed in special meetings
  - Does not preclude discussion of the budget in a special meeting
  - Must report an oral summary of recommendations for final action for salary, salary schedule, compensation for executive



# Compliance - Posting

11

- ❧ Post in a location that is freely accessible to the public 24-hours a day and compliant with ADA
- ❧ Website, on home page in a certain format
- ❧ If teleconference participation, at each teleconference location under original rules



# Teleconferencing

12

- **2 different sets of rules**
- **Original teleconferencing**
- **AB 2449 – Just Cause or Emergency Circumstances**



# Original Teleconferencing

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- ❧ **Votes taken by roll call (applicable for all teleconferencing)**
- ❧ **Agendas posted at each teleconferenced location**
- ❧ **Each location must meet the ADA**
- ❧ **Quorum must be located within geographical boundaries of the agency**
- ❧ **Public may participate from each location**



# New in 2023 - Teleconferencing

14

- ✧ AB 2449 signed into law, effective January 1, 2023
- ✧ Allows members to participate by teleconference in only 2 circumstances (in addition to the original rules)
  - Just Cause
  - Emergency Circumstances



# Just Cause

15

- ❧ Childcare or caregiving need of a child, parent, grandparent, grandchild, sibling, spouse, domestic partner that requires the member to participate remotely
- ❧ Contagious illness
- ❧ Need related to a physical or mental disability as defined
- ❧ Travel on official business of the board or another state/local agency



# To Use Just Cause

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- ❧ The member must notify the board asap, including at the start of a regular meeting, of the need to participate remotely for just cause, including a description of the circumstances relating to the need to appear remotely
- ❧ Just cause cannot be used more than 2 meetings per calendar year





# To Use Just Cause

17

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# Emergency Circumstances

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✧ Physical or family medical emergency that prevents a member from attending in person



# To Use Emergency Circumstances

19

- ❧ Member must request a remote appearance due to emergency circumstances and the board must approve the request. The board shall request a general description of the circumstances, which need not exceed 20 words and need not disclose any medical diagnosis or disability or personal medical information already exempt from disclosure
- ❧ Request must be made asap
- ❧ A new request must be made for each meeting
- ❧ Board may take action at the earliest opportunity; if it's not posted on the agenda, the board may take action at the beginning of the meeting to add it to the agenda if there's not enough time to post on the agenda
- ❧ May only use for 3 consecutive months or 20% of regular meetings for the calendar year, or no more than 2 meetings if the board meets fewer than 10 times per year

# Compliance with New Rules

20

- ❧ Member must announce if there are other individuals 18+ in the room and the general nature of the member's relationship with the individuals
- ❧ Member is to participate through audio and visual technology
- ❧ Physical location required: quorum of members of the board must participate in person from a singular physical location clearly identified on the agenda, open to the public and within the location requirements
- ❧ Must provide at least one of the following so the public may remotely hear, visually observe the meeting, and remotely address the board:
  - Two-way audiovisual platform
  - Two-way telephonic service and a live webcasting of the meeting

# Compliance with New Rules

21

- ✧ Agenda provides notice of the means by which the public may access the meeting and offer public comment
- ✧ Agenda identifies and includes an opportunity for all persons to attend via a call-in option, via an internet based option, and at the in-person location of the meeting
- ✧ Disruptions to technology
  - If disruption prevents the broadcasting of the meeting using the call-in option or internet-based service option, or a disruption within the school's control preventing the public from offering public comment, the board shall take no further action on items on the agenda until public access is restored

# Compliance – Public Participation

22

- Regular meetings:
  - Options
    - ✓ One public comment period for items not on the agenda; public comment before each item
    - ✓ One public comment period for all public comment at one time in the beginning of the meeting, including agenda items and non-agenda items
- Special meetings
  - Testimony only for items described in the agenda
  - Before or during consideration of the item



# Compliance – Rights of the Public

23

- ❧ Cannot censor public comments
- ❧ New Orderly Conduct Rules
- ❧ If public is disrupting a meeting, board chair may remove, or cause the removal of, an individual
- ❧ Disrupting: Engaging in behavior during a meeting that actually disrupts, disturbs, impedes, or renders infeasible the orderly conduct of the meeting and includes one of the following:
  - A failure to comply with reasonable and lawful regulations adopted by the body
  - Engaging in behavior that constitutes use of force or a true threat of force

# Compliance – Rights of the Public

24

- ✧ In order to remove the individual, presiding member or designee shall warn the individual that their behavior is disrupting the meeting and that their failure to cease the behavior may result in their removal
- The warning is not required if the individual engages in behavior that constitutes the use of force or a true threat of force



# Compliance – Closed Session

25

## ❧ Closed Sessions Generally

- Sessions must be expressly authorized by statute
- Narrowly construed
- Strong bias in favor of open meetings
  - ✓ Sensitive, embarrassing or controversial content does not justify application unless expressly allowed
- Semi-closed meetings not allowed

## ❧ Confidentiality of Closed Sessions

- Person attending may not disclose to a non-attendee



# Compliance – Closed Session

26

## ✧ Agenda detail

- Government Code section 54954.5 provides agenda descriptions for all permissible closed session meetings, except for student discipline
- Before convening into closed session, announce what will be discussed – only read the agenda description
- After returning from closed session, may be required to report out action taken



# Compliance – Permissible Closed Session

27

- ☐ Personnel
- ☐ Litigation
- ☐ Real property negotiations
- ☐ Labor negotiations
- ☐ Public security
- ☐ Student discipline
- ☐ Others likely not applicable



# SB 114 – Education Trailer Bill

28

- ❧ **Amends EC 44042.5, which provided schools a process to recoup overpayments from employees; now requires a legal process to collect if the employee disputes the overpayment**
- ❧ **Amends EC 46393, requiring all LEAs to have plans in place to keep pupils learning in the event of school closures (natural disaster, other emergency event)**
- ❧ **Amends EC 47605's appeal process. SBE must find that both the school district and county office of education abused their discretion in denying an appeal. SBE must give deference to the decisions of the school district and COE**

# SB 114 – Education Trailer Bill

29

- ✧ Amends EC 47606.5 relating to the school's LCAP. School must present a report on the annual update to the LCAP and LCFF budget overview for parents on or before 2/28 of each year at a regular meeting, that must include:
  - ✧ All available midyear outcome data related to metrics identified in the current year's LCAP
  - ✧ All available midyear expenditure and implementation data on all actions identified in the current year's LCAP

# SB 114 – Education Trailer Bill

30

- ❧ **Amends EC 47606.4, all charter schools whose terms expire between 1/1/24 and 6/30/27, their terms are extended by one year**
- ❧ **Amends EC 47612.7, precluding new NCB charters until 2026. Requires LAO and FCMAT to study the processes used to determine funding for NCB charter schools**
  - **Identify and make recommendations on potential improvements to the processes, including recommendations for enhancing oversight and reducing fraud, waste, and abuse**

# SB 114 – Education Trailer Bill

31

- ✧ Amends EC 48000, extending the deadline for TK teachers to obtain relevant credential/experience to 8/1/2025
- ✧ Amends EC 52052, to add to the definition of “significant pupil subgroups” long-term English learners, defined as a pupil who has not attained English language proficiency within five years of initial classification as an English learner. This subgroup is separate from English learners

# SB 114 – Education Trailer Bill

32

- ✧ **Amends EC 52064 relating to changes to the LCAP**
  - **Among other things, include specific actions to address instances where a school or pupil group receives the lowest performance level on one or more state indicators on the Dashboard**
  - **Change actions that have not proven effective over a three-year period, including a description of changes that explain the reasons for lack of progress and how any changes to the action will result in a new or strengthened approach**
- ✧ **Adds EC 53008, et seq., requiring the screening of children for reading difficulties; adopt 1+ screening instruments at a public meeting before 6/30/25 and begin assessing 1<sup>st</sup> and 2<sup>nd</sup> graders beginning 2025/26 SY**



# Pending Legislation

33

- | SB 87 – Add EC 270, allows parents to audio record 504 team meetings (Enacted, 2024)
- | AB 438 – Beginning 7/1/25, requires IEPs to include measurable postsecondary goals and transition services beginning when the SPED student enters grade 9



# Pending Legislation

34

AB 611 – requires a charter school within 14 days of becoming aware of any change to the certification status of a nonpublic, nonsectarian school with which it contracts, to notify parents of that change of status if their child(ren) attends that school (Enacted, 2024)

AB 714 – extends coursework flexibility given to homeless youth, etc., to newcomer students, among other things. Newcomer students are immigrants that have not attended school in any state for more than 3 years

# Pending Legislation

35

- **AB 723 – For foster youth with special needs, school of origin is defined to include a certified, nonpublic, nonsectarian school**
- **AB 817 – Allows advisory legislative bodies of the board to have continued flexibility to meet remotely following specified rules**
- **AB 889 – requires schools to annually inform parents of the dangers associated with using synthetic drugs at the beginning of school year (Enacted, 2024)**



# Pending Legislation

36

- **AB 1078 – Will require a change in the Safe Place to Learn Act policy; requires the CDE to monitor whether schools have complied with laws requiring schools to provide pupils will comprehensive, culturally competent, and accurate instruction about the history, experiences and viewpoints of people from different communities in CA**
- **SB 10 – requires a change in the school safety plan to develop strategies for the prevention and treatment of opioid overdoses**



# Pending Legislation

37

- **SB 348 – requires NCB schools to make available nutritionally adequate breakfast and lunch each day for any child on any schoolday that the student is scheduled for educational activities lasting 2 or more hours at a schoolsite, resource center, meeting space, or other satellite facility**
- **SB 445 – requires the school to ensure that parents of a SPED student understand SPED proceedings, including IEP meetings by arranging for an interpreter, translation services or alternative communication**

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# Pending Regulations

38

- **Defines nonparticipatory relating to live interaction/synchronous instruction – not engaging**
  - Engaging includes interaction with classified/certificated staff or two-way communication between the certificated teacher and student
  - LEAs may adopt board policies for requirements associated with other auditory, visual, and/or chat features
- **Requires inclusion in the board policy the minimum length of time by grade level for the delivery of daily live interaction and synchronous instruction in accordance with EC 51747**



# Pending Regulations

39

- **LEAs may establish instructional methods that include paper or visual assignments, lectures, videos, simulcasting, interactive curriculum, and other types of instruction.**
- **Instructional methods shall meet the specific instructional needs for pupils with disabilities, ELs, homeless, foster youth and others requiring accommodations**
- **Vendors may supplement instruction, but shall not be the primary provider of the independent study. Supplemental instruction shall not be counted as synchronous instruction.**
- **Instructional content shall be aligned to grade level standards**
- **Assignments submitted after the due date are eligible for academic credit only**



# Pending Regulations

40

- **Students that are nonparticipatory in synchronous instruction may generate ADA only if they have completed and submitted sufficient work product by the assigned due date that substantiates the time value of a minimum day of instruction and if they comply with all other conditions of traditional independent study**
- **Work samples: LEAs shall determine what constitutes a representative work product sample**
- **Work sample practices should be consistent among teachers within the school**
- **LEAs shall set rules for work sample selection related to frequency and the number of samples by subject or unit of work**
- **Supplemental MAs have the same signature requirements of the**

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# Coversheet

## Proposal for PCA Systems Development

<b>Section:</b>	III. Other Business
<b>Item:</b>	B. Proposal for PCA Systems Development
<b>Purpose:</b>	Vote
<b>Submitted by:</b>	
<b>Related Material:</b>	SOW for PCA Systems Development v1.1.pdf

## Statement of Work

# Purchase Ordering System, Curriculum Catalogue and Events Ordering Application Development Project

Submitted to



Pacific Coast Academy

PIC-C-PCA-072023-001 Version 1.1

July 25, 2023

Prepared by



Pointwest Innovations Corporation

3F Building A, UP-AyalaLand TechnoHub  
Commonwealth Avenue, Diliman, Q.C., 1101

Office: (632) 7917-1100

## STATEMENT OF WORK

### **Pacific Coast Academy Purchase Ordering System, Curriculum Catalogue and Events Ordering Application Development Project**

This Statement of Work ("SOW") is effective as of July 18, 2023 (the "Effective Date") entered into by and between POINTWEST INNOVATIONS CORPORATION ("POINTWEST") and PACIFIC COAST ACADEMY ("CLIENT"), pursuant to the Master Services Agreement ("Agreement") entered into between the parties with an Effective Date of June 24, 2021.

## 1. Introduction

This project aims to build new systems for the use of the CLIENT to replace the versions of Homeschool Hub (Hub), the Curriculum Ordering System (COS), and Field Trips and Events (FTE) that are currently in use.

The current Hub and COS being used by the CLIENT were built in 2021 and have grown in scope and been customized over approximately two years of maintenance, and parts of the original system are no longer used or require workarounds. The current FTE is difficult to maintain due to bugs and performance issues.

The CLIENT wishes to build the new systems, namely Purchase Ordering System (POS), Curriculum Catalogue (CC) and Events Ordering Application (EOA), using new technologies, following the correct design, and including only features required by the CLIENT.

## 2. Project Terms

### 2.1. Estimated Term

This SOW has an estimated term of 54 weeks with estimated start and end dates as follows.

Project Start Date: August 7, 2023

Project End Date: July 26, 2024

## 2.2. Scope of Services

### In Scope - Services

POINTWEST offers its application development service to develop CLIENT's Purchase Ordering System (POS), Curriculum Catalogue (CC) and Events Ordering Application (EOA). This includes:

1. Project Management;
2. Requirements Engineering;
3. Software Development;
4. Software Testing, Vulnerability Testing and Performance Testing;
5. Transition Management;
  - a. Conduct of User Acceptance Testing (UAT) for 2 weeks per Cycle;
  - b. Deployment of POS, CC and EOA to CLIENT's UAT and Production environments;  
and
  - c. Support in set-up of CLIENT's UAT and Production environments;
6. Pilot (Warranty) of 4 weeks

### In Scope - Features

Pointwest shall deliver the features required by PCA as listed in **Annex A - Backlog**.

### Exclusions

The following items are considered as out of scope:

1. All features not listed in the Backlog.
2. Data Migration. A separate Statement of Work can be prepared for Migration.
3. Deployment of Production environment for more than 1 instance per application.
4. Penetration and other types of security testing not stated in Section 2.7.

## 2.3. Proposed Roadmap

The functional and nonfunctional requirements are grouped according to Releases as described below. All descriptions are indicative and actual scope is based on Annex A - Backlog.

### POS Releases

**Release 1:** This release will include setting up the students and their funds for the upcoming school year. The initial configuration for the vendor is also included. The following feature groups comprises this release:

1. **Enrichment School Configuration** - Upload of the enrichment report including for Military families and SPED.
2. **Fund Management** - Assignment of funds through fund management upload
3. **Student** - The uploaded student will be fully displayed in this module. Each student will display their own details
4. **Money Card** - Module that will handle any card details for the transactions
5. **Vendor Management 1** - limited to setting up the Approved Vendors. This module caters to adding new vendors and items that will be seen in ordering. The vendor details will be included in the next release.

**Release 2:** This release will facilitate the setup of items required for ordering. The modules will concentrate on the uploading of items or subscriptions that will be utilized for ordering. The list of modules that are included are as follows:

1. **Vendor Management 2** - the added Approved Vendors will be fully displayed in this module and this includes the vendor details and other information of vendors.
2. **User Management** - Module that handles user accounts, passwords, user assignment, and MFA assignment
3. **Tech Configuration** - Tech items and tech vendors are uploaded in this module. The uploaded tech items are listed in this module. This module also covers approving tech items that were ordered by the user and has processing status.
4. **OSP Management 1** - The list of subscription items are displayed and let the user configure the availability of the item. Editing of item details is also included in this module.

**Release 3:** Modules in this release cover the process of ordering and approval of orders. The development of modules in this release will need all of the data that were uploaded in the previous releases.

1. **Student Order Management 1** - The development of the module focuses on the ordering process made by the users. This includes the creation of orders, and list of orders created.
2. **Student Order Management 2** - In continuation of the previous module, this part focuses on the approval process of orders. This includes status updates of the orders, and updates in order details.
3. **OSP Management 2** - The module handles approving any OSP orders that need to be approved or disapproved. It is connected to the two previous modules that are part of this release.

**Release 4:** This release encompasses inventory management, data visualization, form creation, and video guidelines, followed by the addition of a new module to the system: content management. The following modules are included in this release:

1. **Student Inventory** - The list of orders of each student are listed here in this module, and let the user download the inventory details.
2. **Content Management (Announcement Banner & Logo)** - Module that handles creation and publishing of announcements that will be displayed in the systems, and uploading of logo that will update any changes in the display of logos in the system including any downloadable forms
3. **Videos** - The uploading of videos, and adding & editing of video details covers this module. Videos can also be viewable or not by the users by activating/deactivating it.
4. **FAQ Management** - Upload FAQs form, and add & update any FAQ details
5. **Guidelines Management** - Upload Guidelines form, and add & update any Guidelines details
6. **Dashboard** - Graphical representations of students, orders, inventories, are items that are transacted in the systems

**Release 5:** In this release, the emphasis is on workflow of staff-related procedures. This encompasses the ordering process, approval of orders, uploading of the staff list, as well as managing inventory that is specifically designated for staff use.

1. **Staff Management** - Module that handles uploading of staff information, and assign a user as a staff
2. **Staffs** - List of staff that were uploaded in the system. Staff details are viewable in this module together with other information and orders
3. **Staff Order Management** - The ordering, and approving of orders for staff takes place in this module. Updates in status and details of orders are also included here.
4. **Staff Inventory** - List of staff items that are ordered by the staff. Downloading of inventories for staff is also part of this module

## CC Releases

**Release 1:** The emphasis is on the upload of curriculum and courses, which are essential for the ordering process of CC. The modules that enable this are as follows:

1. **Curriculum Management** - Includes uploading, viewing, adding & editing curriculum details
2. **Course Management** - This particular module focuses on the functions of uploading, viewing, adding, and editing course information. It must be taken note that this module is integrated with Curriculum Management, as a course is an essential element of any curriculum.

**Release 2:** This release covers the management of HQTs, Viewing the student records and management of orders. The description of each module are as follows:

1. **HQT Management** - Caters to the uploading and displaying the list of HQT.
2. **View Student Records** - The uploaded student records in POS will be displayed in this module. Each student will display details of their own record including the details of the Course orders.
3. **Order Management** - The ordering, and approving of orders of courses takes place in this module. Updates in status and details of orders are also included here.

**Release 3:** The release will only focus on the first part of the process of approving orders in this system.

1. **Task Management 1** - Module that covers the approving of orders in CC and changes in the order status must take place

**Release 4:** The final phase of the CC release includes further development of the task management feature, as well as the exclusive Report and Videos modules that are designed specifically for this system. The modules that will be included in this phase are as follows:

1. **Task Management 2** - Continuation of Task Management 1, that will cover other process of approving of orders
2. **Report** - It covers downloading of reports that is correlated to any transactions happen in COS
3. **Video** - The uploading of videos in using CC, and adding & editing of video details covers this module. Videos can also be viewable or not by the users by activating/deactivating it.

## EOA Admin Site Releases

**Release 1:** The release emphasizes the establishment of Event Types for Adding Request Events. It includes the introduction of the Event Request Module, which handles the approval process for events. Additionally, it incorporates email sending and attachment storage configuration.

1. **Configurations - Event Type** - Adding new type of events that will become an options once a user started creating an event
2. **Event Request** - List of event requests that are ready for approval or not. This also displays the status of the Event whether it is still active/inactive
3. **Non Functional Requirements** - Setting up email configurations and storage of the system to cater different attachments and images.

**Release 2:** The release will include several modules that emphasize the creation of Event Requests. Additionally, the release will incorporate the functionality to add event venues, providing an overview of event locations. Configurations for Waivers and the Homepage will also be included, enabling users to edit waivers and customize the display of the system's homepage.

1. **Event Request - Add Event** - Setting up new event request that contains details that also requires of pulling from the database and storing attachments
2. **Configuration - Waiver Agreement** - Editing the details of the waiver will be part of this feature as it also saves changes and creates a new one.
3. **Configuration - Venue** - Creation of Event Venue that will be viewed in creating Event Requests
4. **Configuration - Homepage** - Uploading and deleting images that will be displayed in the homepage of the Client Facing System

**Release 3:** The primary emphasis of this release will be on monitoring and tracking changes in event requests. Additionally, it will introduce the capability to configure codes that will govern certain non-functional requirements and system displays.

1. **Bookings** -The module will showcase the real-time count of orders placed in an event. It will also provide details of orders placed by the users. Functionality to approve orders is also part of this module.
2. **System Settings** - Its purpose is to configure codes without checking out the backend. One of the functionalities it can control is ending the message and display of banner on the homepage

**Release 4:** The final phase of the system release is dedicated to managing the displayed notes within the system. This encompasses the management of the FAQ and inspirations sections. Furthermore, it includes the administration of the subscriber list.

1. **FAQ Management** - This module incorporates the functionality to add, edit, and delete FAQ details. Additionally, it provides control over the display of the FAQ, allowing administrators to determine whether or not to show the FAQ in the section.
2. **Inspirations** - List of Ideas that were sent to the administrators view the details
3. **Subscribers** - The module focuses on managing the list of subscribers, providing the ability to edit their details. This enables administrators to modify subscriber information as needed.

## EOA Client-Facing Site Release

The release primarily concentrates on showcasing created events, allowing clients to book their desired events. Additionally, it includes the development of a module that provides details on the bookings purchased by the users.

1. **Events** - List of available events that are available for booking. The transactions in booking also includes in this modules



2. **Account - Booking History** - It tracks the transactions/bookings of the user including the payment history
3. **Account - Password Management** - The system is designed to specifically manage passwords for different accounts. It provides functionality for users to create and update their passwords.
4. **Account - User Profile** - The system provides comprehensive user details, including information such as user profiles, account information, and any relevant user-specific data.
5. **Home** - Displays the images uploaded from the backend to showcase the purpose of the system
6. **FAQ** - The system displays the Frequently Asked Questions (FAQs) that have been added in the backend. This feature allows users to access and view the compiled list of common questions and their corresponding answers, providing helpful information and addressing common queries.
7. **Non-Functional Requirements** - The requirements include functionality for managing emails and storage. This involves features such as email configuration, handling incoming and outgoing emails, and managing storage resources such as file attachments and data storage. It ensures efficient email communication and effective storage management within the system.

## 2.4. Project Initiation

Pointwest will commence with the assignment and placement of team resources to the project. Team resources will use the project artifacts from the current Homeschool Hub and COS Maintenance phases to acquire sufficient knowledge to perform their assigned roles. The kickoff will officially start the project. At this stage, the project and its outcome are presented to all stakeholders. It is also at this point that POINTWEST's team and the appropriate contact persons and decision-makers are introduced.

The overall planning will be defined and establish protocols and standards for communication, monitoring, controlling, reporting, issue escalation and resolution, configuration management, quality metrics and risk identification and assessment.

During the stage, the project team will identify and coordinate requirements for the project which includes: environment set-up, software licenses, hardware, policy.

## 2.5. Software Development

### Requirements Engineering

This activity will aim to maintain the requirements backlog, as attached, based on the scope of work. The details and the business rules of each requirement will be expounded on, broken down into backlogs, finalized, and prioritized with the Product Owner. This will be the basis for the deliverables planning and allocation moving forward.

1. POINTWEST shall coordinate with the designated CLIENT Product Owner to expound on, break down the requirements into deliverable backlog items. The backlog shall be the basis for the planning and allocation of resources moving forward.
2. CLIENT shall finalize the details, and prioritize the delivery of the requirements.
3. CLIENT shall sign off on the baseline requirements.

### Analysis and Design

A detailed review of how the application components will be built, separately and then integrated together is warranted in order to finalize the implementation solution both on a per application standpoint and as an ecosystem as a whole.

System design documents covering POS, CC, and EOA,, and, the over-all reference solution architecture will be the output of this stage. The signed-off documents at this stage will be used for the construction, testing and user acceptance stages.

1. POINTWEST shall perform a detailed review of the application components for each of the individual applications.
2. POINTWEST shall identify the implementation solution both on a per application standpoint and as an ecosystem as a whole, and shall document the design into a System Design Documentation (SDD) which will showcase the overall reference architecture.
3. CLIENT shall sign off on the SDD.

### Environment Setup and Construction

The developers will use all artifacts from the analysis and design stages to construct both the applications. Aside from a working version of developed application components, all related design artifacts will be updated.

1. POINTWEST shall set up the development, testing and UAT environments.

2. POINTWEST will develop the application based on the requirements output, and all artifacts produced during the analysis and design phase.
3. POINTWEST shall deploy the working application in the proper environment, depending on the phase of the development cycle.
4. POINTWEST will update all development artifacts.

## Testing

Testing will ensure that the product that is being built is well constructed and follows the specifications. Issues that are identified depending on the discussion between the Business Analysts, Developers and the Quality Engineers, will be clarified or converted into a bug to be fixed.

Testing will be done in several layers: (1) Functional Testing on a per feature level, (2) Integration Testing for each of the planned iteration phases.

Also folded in the levels of testing are sanity testing, regression testing and the retesting of the functionalities that encountered issues in the construction phases.

1. POINTWEST shall confirm and ensure the quality of the application by performing functional testing and integration testing against the application.
2. POINTWEST will raise and clarify any issues to the development team including and to the client for any non-compliance on the requirements or standard behaviors.
3. POINTWEST will ensure that all confirmed bugs with critical and high-severity are resolved.
4. POINTWEST shall present to the client the outcome of the functional testing and provide recommendations on the resolution for each issue.
5. POINTWEST and CLIENT shall agree on the resolution and acceptance of behaviors of the medium and low-severity issues.
6. POINTWEST and CLIENT shall prioritize the defect fixes to align with the required milestones.
7. CLIENT shall confirm with POINTWEST on the expected behavior for issues raised.

## 2.6. User Acceptance Testing (UAT)

The release undergoes User Acceptance Testing and any findings are logged. Issues logged during the initial Cycle will be fixed and retested in the succeeding cycle

Any UAT finding that is a major divergence from complexity assumptions, identified change in scope, and/or constraints will be managed through a change control process and undergo Change Management.

User Acceptance Testing, will be for a period of two (2) weeks for each application release. The first week will be focused on the testing of the application, while the second week will be on the retesting of the fixes.

1. Once a working version of the released has passed the quality assurance, POINTWEST shall deploy the version to the UAT environment
2. POINTWEST shall present a demo of the release to the CLIENT.
3. CLIENT shall plan for and execute scenarios to test the coverage of each release.
4. CLIENT shall raise and log issues encountered within the testing duration
5. POINTWEST and CLIENT will review all raised issues and identify the severity and priority for each issue.
6. POINTWEST will ensure that all confirmed bugs with critical and high-severity are resolved.
7. POINTWEST and CLIENT shall agree on the resolution and acceptance of behaviors of the medium and low-severity issues.
8. CLIENT shall provide signoff once the UAT duration has elapsed, or until all identified critical and high-severity issues are resolved.

The release is deemed to have been accepted given any of the following and whichever comes first. POINTWEST and CLIENT shall sign off on the acceptance for any of the cases.

1. CLIENT completed Final Verification and the release has been signed-off.
2. The scheduled deadline for completion of UAT for the release has passed (as indicated in Section 2.11 Client Feedback/Turnaround Time) and CLIENT has not completed testing. Should the CLIENT wish to delay acceptance, the Change Management process will be triggered. Additional costs to support UAT as well as any costs due to the impact on the overall project will be billable to the CLIENT.

## 2.7. Security Testing

Security practices will be ingrained in all phases.

A vulnerability assessment will be performed by POINTWEST as part of the hardening activities prior to the release of the application to Production.

1. POINTWEST shall ensure that security practices are ingrained and adopted in all phases of the project
2. POINTWEST shall perform a vulnerability assessment on the applications, prior to its release in production.
3. POINTWEST shall present and provide recommendations on the resolution of security issues
4. POINTWEST will ensure that all confirmed bugs with critical and high-severity are resolved.

5. POINTWEST and CLIENT shall agree on the resolution and acceptance of behaviors of the medium and low-severity issues.
6. CLIENT shall sign-off on the outcome of the security testing.

## 2.8. Production Deployment

Once the application has passed the last planned UAT and the Security Testing, POINTWEST will start the handover process to the PCA Support Team. This involves the transfer of all project artifacts such as requirements documentation, test results, source code, and a final walkthrough of the solution to the eventual support and maintenance team, as needed.

Details on the Release will be documented in the Release Notes provided to PCA.

## 2.9. Warranty

The warranty period will commence after the last UAT sign-off or promotion of release in production, whichever comes first and will last for four (4) weeks.

During the warranty period Pointwest will fix the valid defects identified in PRODUCTION by CLIENT at no additional cost. Coverage of the warranty is only for the features identified during the construction phase.

CLIENT may engage Pointwest to provide application support and maintenance to cover requirements outside of the warranty.

## 2.10. Maintenance

This proposal does not include support and maintenance.



## 2.11. Indicative Schedule and Deliverables

Below is the projected timeline:

ID	Activity	Indicative Timeline	Deliverables	Delivery Dates	Client Feedback/ Turnaround Time
A	Project Initiation	8/7/2023 - 9/1/2023	<ul style="list-style-type: none"> <li>Project Kick-off</li> <li>Work Management Plan (WMP)</li> </ul>	<p>Project Initiation will commence after the mobilization period.</p> <p>Project kickoff scheduled within 5 days after the start of Project Initiation.</p> <p>WMP submitted 10 business days after the start of Project Initiation</p>	CLIENT reviews and provides feedback/ sign-off after 5 days from receipt of Deliverables
B	Analysis, Design and Environment Setup	9/4/2023 - 10/6/2023	<ul style="list-style-type: none"> <li>Overall Reference Solution Architecture</li> </ul>	Presentation of Architecture: 9/26/2023	CLIENT reviews and provides feedback/ signoff after 5 days from receipt of deliverable
<b>Purchase Ordering System</b>					
C	Release 1				
	Development	10/9/2023 - 12/1/2023	<ul style="list-style-type: none"> <li>Purchase Ordering System Release 1</li> </ul>	UAT endorsement: 12/4/2023	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	12/4/2023 - 12/15/2023			
D	Release 2				
	Development	11/27/2023 - 1/19/2024	<ul style="list-style-type: none"> <li>Purchase Ordering System Release 2</li> </ul>	UAT endorsement: 1/22/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	1/22/2024 - 2/2/2024			
E	Release 3				
	Development	1/15/2024 - 3/15/2024	<ul style="list-style-type: none"> <li>Purchase Ordering System Release 3</li> </ul>	UAT endorsement: 3/18/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	3/18/2024 - 3/29/2024			

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Purchase Ordering System, Curriculum Catalogue and Events Ordering Application Development Project

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ID	Activity	Indicative Timeline	Deliverables	Delivery Dates	Client Feedback/ Turnaround Time
F	Release 4				
	Development	3/11/2024 - 4/26/2024	<ul style="list-style-type: none"><li>Purchase Ordering System Release 4</li></ul>	UAT endorsement: 4/29/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	4/29/2024 - 5/10/2024			
G	Release 5				
	Development	4/22/2024 - 6/14/2024	<ul style="list-style-type: none"><li>Purchase Ordering System Release 5</li></ul>	UAT endorsement: 6/17/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	6/17/2024 - 6/28/2024			
	Curriculum Catalogue				
H	Release 1				
	Development	11/6/2023 - 1/12/2024	<ul style="list-style-type: none"><li>Curriculum Catalogue Release 1</li></ul>	UAT endorsement: 1/15/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	1/15/2024 - 1/26/2024			
I	Release 2				
	Development	1/18/2024 - 3/8/2024	<ul style="list-style-type: none"><li>Curriculum Catalogue Release 2</li></ul>	UAT endorsement: 3/11/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	3/11/2024 - 3/22/2024			
J	Release 3				
	Development	3/4/2024 - 5/3/2024	<ul style="list-style-type: none"><li>Curriculum Catalogue Release 3</li></ul>	UAT endorsement: 5/6/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	5/6/2024 - 5/17/2024			
K	Release 4				
	Development	4/29/2024 - 6/14/2024	<ul style="list-style-type: none"><li>Curriculum Catalogue Release 4</li></ul>	UAT endorsement: 6/17/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	6/17/2024 - 6/28/2024			
	Events Ordering Application				

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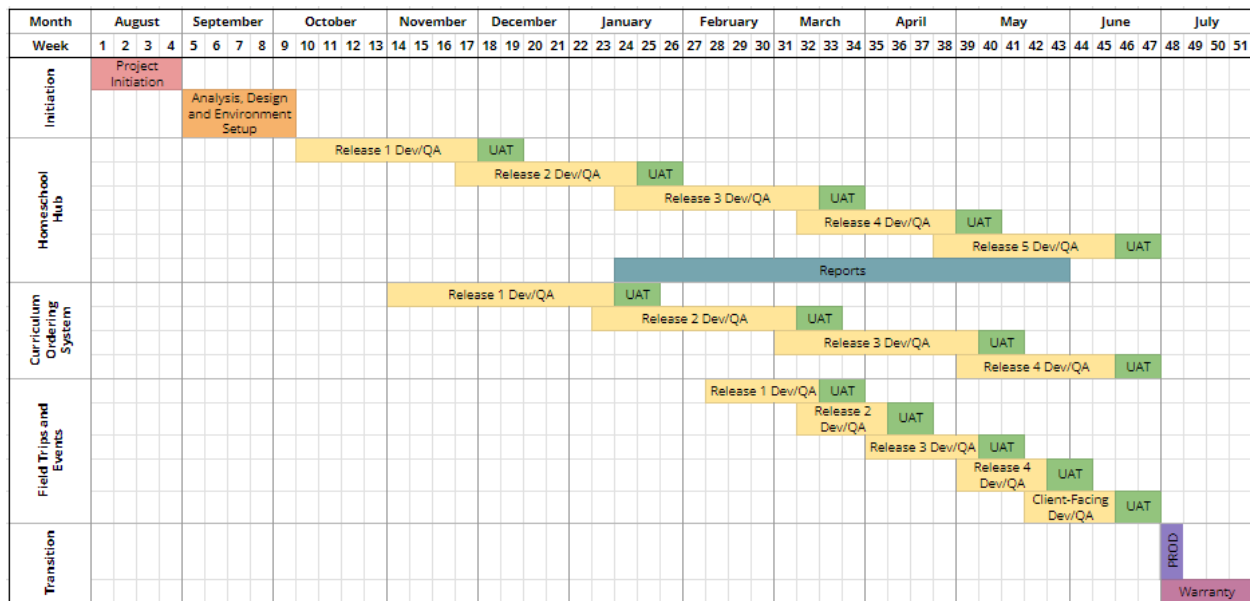
Purchase Ordering System, Curriculum Catalogue and Events Ordering Application Development Project

PIC-C-PCA-072023-001

ID	Activity	Indicative Timeline	Deliverables	Delivery Dates	Client Feedback/ Turnaround Time
L	Release 1				
	Development	2/12/2024 - 3/15/2024	<ul style="list-style-type: none"><li>Events Ordering Application Admin Release 1</li></ul>	UAT endorsement: 3/18/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	3/18/2024 - 3/29/2024			
M	Release 2				
	Development	3/11/2024 - 4/5/2024	<ul style="list-style-type: none"><li>Events Ordering Application Admin Release 2</li></ul>	UAT endorsement: 4/8/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	4/8/2024 - 4/19/2024			
N	Release 3				
	Development	4/1/2024 - 5/3/2024	<ul style="list-style-type: none"><li>Events Ordering Application Admin Release 3</li></ul>	UAT endorsement: 5/6/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	5/6/2024 - 5/17/2024			
O	Release 4				
	Development	4/29/2024 - 5/24/2024	<ul style="list-style-type: none"><li>Events Ordering Application Admin Release 4</li></ul>	UAT endorsement: 5/27/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	5/27/2024 - 6/7/2024			
P	Client-Facing				
	Development	5/20/2024 - 6/14/2024	<ul style="list-style-type: none"><li>Events Ordering Application Admin Client-Facing Application</li></ul>	UAT endorsement: 6/17/2024	CLIENT to provide UAT Sign-off within 10 days after UAT endorsement
	User Acceptance Testing	6/17/2024 - 6/28/2024			
Q	Production	7/1/2024 - 7/5/2024	<ul style="list-style-type: none"><li>Production Environment Setup and configuration</li><li>Deployment of the Integrated POS, CC and EOA in Production</li><li>Sanity Testing</li></ul>	Deployment to production on 7/5/2024	CLIENT to provide notice to deploy to production 24 hours before the planned deployment to production



ID	Activity	Indicative Timeline	Deliverables	Delivery Dates	Client Feedback/ Turnaround Time
R	Warranty	7/1/2024 - 7/26/2024	<ul style="list-style-type: none"> <li>Production Support for Bugs raised</li> <li>Completion Certificate</li> </ul>		CLIENT to provide Project Close out certificate on the last day of the Warranty schedule



With each Application Release for CLIENT UAT, Pointwest will deliver the following:

- Test Summary Report
- Release Notes
- Release Demo
- UAT Endorsement which will trigger the start of UAT for each release.

During UAT, Pointwest will deliver the following:

- UAT Support for 2 weeks
- Bug Fixes for Critical and High-severity issues.
- Source Codes (contingent on payment completion)

Any delays in the Turnaround Time or provision of CLIENT Feedback to POINTWEST may incur charges and other changes to the SOW, and shall be subject to the Change Management Process.

### 3. Commercial Terms

#### 3.1. Total Contract Price

The total Contract Price for this engagement is USD 762,390, exclusive of taxes and other fees.

#### 3.2. Billing Milestones

For the implementation of the activities to develop POS, CC and EOA for Pacific Coast Academy, POINTWEST shall charge CLIENT using the following billing schedule:

Activity/Milestone	Amount (VAT-ex)
Mobilization	\$ 114,360
Submission of the High-Level Design and Architecture	114,360
POS Release 1 Endorsement for UAT	70,390
POS Release 2 Endorsement for UAT	70,390
POS Release 3 Endorsement for UAT	73,210
POS Release 4 Endorsement for UAT	42,230
POS Release 5 Endorsement for UAT	56,310
CC Release 1 Endorsement for UAT	38,010
CC Release 2 Endorsement for UAT	39,420
CC Release 3 Endorsement for UAT	30,970
CC Release 4 Endorsement for UAT	25,340
EOA Release 1 Endorsement for UAT	13,730
EOA Release 2 Endorsement for UAT	10,910
EOA Release 3 Endorsement for UAT	13,730
EOA Release 4 Endorsement for UAT	10,910
Deployment to Production	19,060
End of Warranty/ Project Closeout	19,060
<b>TOTAL</b>	<b>\$ 762,390</b>

The costs indicated above do not include the following costs which shall be borne by CLIENT:

- Cost of AWS hosting including the required licenses
- Cost of selected project source code repository
- Hourly rate for billable change requests is USD 33.50 (VAT-ex)

### 3.3. Invoicing and Payment Terms

1. POINTWEST shall send an invoice to CLIENT based on the above billing schedule.
2. Payment shall be made within thirty (30) calendar days from receipt of invoice. Overdue payments shall bear interest at a rate of six percent (6%) per annum for the period commencing on the due date until the same are paid in full.
3. POINTWEST reserves the right to suspend services in case of overdue payments.
4. Source code delivery is contingent on payment completion.

### 3.4. Invoicing Communications

Invoices shall be sent to CLIENT at the following address:

Pacific Coast Academy  
Attn: Maria Zoraida Arkangel  
maria.arkangel@cabrillopointheademy.org

Inquiries should be directed to:

Pointwest Innovations Corporation  
Attn: Kris Ann Daclag  
kris.daclag@pointwest.com.ph  
+63-2-917-1100

## 4. General Terms

### 4.1. Agreement

This SOW is governed by all terms and conditions of the Agreement between the Parties, the terms of which are incorporated herein and made a part hereof. In the event of any conflict between the terms of the Agreement and the terms of this SOW, the SOW shall prevail.

### 4.2. Key Business and IT Contacts

	POINTWEST	PACIFIC COAST ACADEMY
Name:	Vanessa Marie Villapando	Maria Zoraida Arkangel
Designation:	Associate Manager	Systems Technology Director
Email:	vanessa.villapando@pointwest.com.ph	maria.arkangel@cabrillopointheademy.org
Name:	Teresa Tamayo	Shari Erlendson
Designation:	Business Unit Manager	Deputy Executive Director
Phone:	+632 917 827 0665	(619) 339-1516
Email:	teresa.tamayo@pointwest.com.ph	shari.erlendson@pacificcoastacademy.org

### 4.3. Location of Services

POINTWEST operates under a hybrid work arrangement where its resources work either from one of its delivery centers (currently in Makati and Quezon City, Philippines) or remotely from home.

### 4.4. Work Schedule

The team shall observe Philippine business hours: Monday - Friday, from 8:00 A.M. to 5:00 P.M. excluding Philippine non-working regular and special holidays. Key resources may be scheduled by POINTWEST during CLIENT working hours to facilitate communication, as required.

All days referenced in this SOW are business days unless otherwise stated.

Flexible schedule arrangements shall be mutually approved by both Parties.

#### 4.5. Communication and Reporting

For communication, POINTWEST and CLIENT shall primarily use the following:

- Emails
- Google Chat for instant messaging
- Google Meet conference calls

For status reporting, POINTWEST shall send out a weekly progress report to the relevant stakeholders.

#### 4.6. Infrastructure and Access Requirements

POINTWEST shall provide the workstation (laptop or desktop) and office space needed for a resource to accomplish his/her assigned work. Software licenses and devices that are non-standard to POINTWEST shall be provided by (i) CLIENT; or (ii) by POINTWEST through a separate agreement.

On a work-from-home setup, POINTWEST shall provide the computer equipment (laptop or desktop) and collaboration tools that may be needed for a resource to accomplish his/her assigned work. Software licenses and devices that are non-standard to POINTWEST shall be provided by (i) CLIENT; or (ii) by POINTWEST under a separate agreement.

CLIENT shall provide POINTWEST resources access to systems, tools and equipment necessary to deliver the service.

#### 4.7. Mobilization and Schedule Management

Resource and overall project mobilization is contingent upon a formal contract between POINTWEST and CLIENT. Once formally executed, CLIENT shall provide POINTWEST with at least ten (10) business days from contract signing to mobilize.

The delivery schedule has taken into account the dependencies of activities that involve CLIENT resources. The project team shall give its best efforts to move forward with the project schedule, contain costs and remain productive during possible dependency delays in feedback, dependent components and other inputs, making workarounds whenever possible. However, any delays in expected CLIENT feedback or turnaround time that affect the project shall be subject to Change Management.

POINTWEST may choose to suspend services in case of overdue payments. Any suspension or remobilization will trigger the Change Management process. Additional fees for remobilization may be due in addition to the assessed change or impact on the project.

#### 4.8. Change Management and Control

Any changes to this SOW, including changes to the assumptions, scope of work, and any other project parameters, must be in writing and agreed upon by all parties. A Change Request (CR) may entail additional costs to the CLIENT. The CR shall be approved by the following:

Maria Zoraida Arkangel, Systems Technology Director, PCA  
Shari Erlendson, Deputy Executive Director, PCA  
Teresa A. Tamayo, Business Unit Head, POINTWEST

#### 4.9. Indemnity

Each party agrees to defend, indemnify and hold harmless the other party from and against any and all claims, demands, loss, liability, damage, cost or expense incurred by the other party (including reasonable attorneys' fees) (collectively, "Claims") that is the direct result of a material breach by that party of this Agreement. In addition, POINTWEST agrees to indemnify and hold CLIENT harmless from and against any and all Claims relating to or arising from the Deliverables and/or the Services, including, without limitation, any and all Claims related to or made by any Personnel.

#### 4.10. Rights to Work Product

POINTWEST hereby grants to CLIENT a perpetual, irrevocable, fully-paid up, royalty-free, transferable, assignable, non-exclusive right and license to use, reproduce, display and perform all or any portion of the materials incorporated into the work products or deliverables provided hereunder for use in connection with the project. Further, the CLIENT is granted the right to sub-license or create derivative works from the said work products or deliverables.

POINTWEST retains the right to distribute, disseminate, and otherwise license the work products or deliverables in any manner that does not violate any other portion of this SOW. Notwithstanding any provision in this section, the CLIENT retains ownership of any data, information, or other property stored, saved, transmitted or otherwise transformed by the licensed application.

#### 4.11. Termination

Upon completion of the Warranty, POINTWEST and CLIENT shall sign off on the project acceptance to signify completion of the project, thus terminating this SOW.

This SOW may be pre-terminated in case of failure to cure a material breach as defined in the Agreement.

In the event of pre-termination by the client without due cause, CLIENT shall pay POINTWEST all outstanding invoices from the completed milestones plus fifty percent (50%) of the amount of the remaining contract price. Upon pre-termination of this agreement, POINTWEST shall be released from its obligations to the CLIENT upon submission of the completed or incomplete deliverables as of the date of pre-termination.

This Statement of Work is signed and executed between POINTWEST and CLIENT effective as of the Effective Date.

**POINTWEST INNOVATIONS CORPORATION**

By:

Name : Rey E. Untal  
Title : President  
Date :

**PACIFIC COAST ACADEMY**

By:

Name: Maria Zoraida Arkangel  
Title : Systems Technology Director  
Date :

Name: Shari Erlendson  
Title : Deputy Executive Director  
Date :

## Annex A - Backlog

### Purchase Ordering System

ID	Module	Title	User	Description
<b>MFA</b>				
POS-MFA-01	Non-Functional	OTP feature in POS [1]		POS must be able to send OTP every 15 days to send a verification password.
<b>Dashboard [2]</b>				
POS-D-01	Dashboard	Student Funds Statistics	System Admin	User is able to view in their dashboard Student Fund Statistics. This is a bar chart for Funds spent depending on Order Types and Unsettled funds.
POS-D-02	Dashboard	Student Cards	System Admin	User is able to view Student Cards that display number of active students, inactive students and total students.
POS-D-03	Dashboard	Top Service Vendors Table	System Admin	User is able to view a table that displays the Top 10 Service Vendors used by the Students.
POS-D-04	Dashboard	Top Product Vendors Table	System Admin	User is able to view a table that displays the Top 10 Product Vendors used by the Students.
POS-D-05-00	Dashboard	Pie Chart for All Service Orders	System Admin	User is able to view a Pie Chart for All Service Orders. Pie Chart shows from where the items are ordered from and Filter can be changed to Per Order, Per Order Item and Per Order Amount.
POS-D-05-01	Dashboard	Show By Filter	System Admin	A filter that will change the display of the chart based on Per Order, Per Order Item, and Per Order Amount.
POS-D-06-00	Dashboard	Pie Chart for All Product Orders	System Admin	User is able to view a Pie Chart for All Product Orders. Pie Chart shows from where the items are ordered from and Filter can be changed to Per Order, Per Order Item and Per Order Amount.
POS-D-06-01	Dashboard	Show By Filter	System Admin	A filter that will change the display of the chart based on Per Order, Per Order Item, and Per Order Amount.
POS-D-07-00	Dashboard	Invoice Orders Stats	System Admin	User is able to view a Line Graph for Invoice Orders Stats per Order Type. These filters are available in this graph: Group by (Group by Month, Group by Week), Filter by (School Year by Month), and School Year.
POS-D-07-01	Dashboard	Invoice Order Filters	System Admin	A filter that will change the display of the chart based on Weeks, Months, School Year.
<b>Student Order Request</b>				
POS-SOR-01-00	Student Order Request	View List of Orders	Admin, Tech Processor, Teacher, Guardian, Lead Teacher	User must be able to view the list of orders, page size, and page number.
POS-SOR-01-01	Student Order Request	Option to change Page Size	System Admin, Lead Teacher	User must be able to change the Page Size.
POS-SOR-01-02	Student Order Request	View and Select Page Number	System Admin, Lead Teacher	User must be able to view and select Page Number.
POS-SOR-02	Student Order Request	View Card for every Order Statuses	System Admin, Lead Teacher	User must be able to view the card of every Order Statuses.
POS-SOR-03	Student Order Request - Create Order	View and Select Create Order Button	System Admin	User must be able to view and select "Create Order" Button.
POS-SOR-03-01	Student Order Request - Create Order	View Student list	System Admin	User must be able to view the list of students and select a student for creating an order.
POS-SOR-03-02	Student Order Request - Create Order	Student Selection Search Box	System Admin	User must be able to view and search.
POS-SOR-03-03	Student Order Request - Create Order	Student Selection Search By Filter	System Admin	User must be able to search by different options.
POS-SOR-03-04	Student Order Request - Create Order	Student Selection Search as Filter	System Admin	User must be able to choose what type of user role he must be.
POS-SOR-03-05	Student Order Request - Create Order	Order Request Info - Student Details	System Admin	User must be able to view the Student Details that was selected by the user.
POS-SOR-03-06	Student Order Request - Create Order	Order Request Info - Product & Others	System Admin	User must be able to create requirements in creating order request.
POS-SOR-03-07	Student Order Request - Create Order	Order Request Info - Service	System Admin	The Order Request Information Tab must be able to display details for the Service Order type.
POS-SOR-03-08	Student Order Request - Create Order	Order Request Info - Other Vendor for Product, Service, & Others	System Admin	If the user selects the Other Vendor in Vendor Selection, there will be no catalog appears.
POS-SOR-03-09	Student Order Request - Create Order	Order Request Info - Product, Service, & Others Search Bar	System Admin	The Product & Service Catalog must have Search by Filter for searching.
POS-SOR-03-10	Student Order Request - Create Order	Order Request Info - Product, Service, & Others Search Bar	System Admin	Search box must be able to select and input keyword based on Search by Filter.
POS-SOR-03-11	Student Order Request - Create Order	Order Request Info - Tech Orders, Tech 6500, Tech 1516, Tech 3010, Tech CTE	System Admin	The Order Request Information Tab must be able to display details for the Tech Orders, Tech 6500, Tech 1516, Tech 3010, Tech CTE Order type.
POS-SOR-03-12	Student Order Request - Create Order	Order Request Info - Curriculum, COA, OSP A la Carte [4]	System Admin	The Order Request Information Tab must be able to display details for the Curriculum, COA, Lending Library, OSP A la Carte Order type.
POS-SOR-03-13	Student Order Request - Create Order	Summary of Student Details, Order Request Info in Add Order Items Step	System Admin	System must be able to display the Student Details, and Order Request Info.
POS-SOR-03-14	Student Order Request - Create Order	Add Order Items - Vendor URL must be able to select a link	System Admin	User must be able to click the Vendor Link.
POS-SOR-03-15	Student Order Request - Create Order	Add Order Items - Product & Others	System Admin	User must be able to display the details for Product and Others Order Type.
POS-SOR-03-16	Student Order Request - Create Order	Add Order Items - Able to Add Item	System Admin	User must be able to Add Order Items for Product, Tech Orders, Tech 6500, Tech 1516, Tech 3010, Tech CTE.
POS-SOR-03-17	Student Order Request - Create Order	Add Order Item - Detailed List of Services	System Admin	The Detailed List of Services must be displayed by the system.
POS-SOR-03-18	Student Order Request - Create Order	Add Order Item - Able to Add Item for Service	System Admin	User must be able to add Order Item for Service.
POS-SOR-03-19	Student Order Request - Create Order	Add Order Item - Add Item	System Admin	User must be able to select a quantity and this will affect the number of Service Unit Data.
POS-SOR-03-20	Student Order Request - Create Order	Add Order Item - Add Service Catalog	System Admin	User must be able to select courses in the service that he chose.
POS-SOR-03-21	Student Order Request - Create Order	Add Order Item - Curriculum, COA, Lending Library, OSP	System Admin	System must be able to display the details for this type of order.
POS-SOR-03-22	Student Order Request - Create Order	Order Request Info - Shipping Details	System Admin	System must be able to input details manually.
POS-SOR-03-23	Student Order Request - Create Order	Order Request Info - Order Summary	System Admin	User must be able to view the summary of orders.
POS-SOR-03-24	Student Order Request - Create Order	Order Request Info - Order Summary	System Admin	- User must be able to select Puncture - User must be able to view a model that displays different vendors like Amazon - User must be able to select the vendor - System must be able to redirect the user to the vendor's link - User must be able to order from them using the school details - Once the order is placed, the system will verify the order and redirect the user back to the POS - System will provide the order id and a Pending status order will be tagged to the order - Current balance will be updated
POS-SOR-03-25	Student Order Request - Create Order	Order Request for purchase	System Admin	
POS-SOR-04-00	Student Order Request	View and Select Search By	System Admin, Lead Teacher	User must be able to view and select what type of filter can be used in searching.
POS-SOR-04-01	Student Order Request	View and Select Order Type Filter	System Admin, Lead Teacher	User must be able to view and select "Select Order Type" filter.
POS-SOR-04-02	Student Order Request	View and Select the School Year Filter	System Admin, Lead Teacher	User must be able to view and select School Year.
POS-SOR-04-03	Student Order Request	View and Select Student Status Filter	System Admin, Lead Teacher	User must be able to view and select Student Status for filter.
POS-SOR-04-04	Student Order Request	View and Select Assigned to Self Filter	System Admin	User must be able to tick the box if the list of orders whether assigned to themselves or not.
POS-SOR-04-05	Student Order Request	View and Search in Search Box	System Admin, Lead Teacher	User must be able to view and type in Search Box.
POS-SOR-04-06	Student Order Request	View and Select Clear Button	System Admin, Lead Teacher	User must be able to view and select "Clear Filter" button.
POS-SOR-05	Student Order Request	View Order Requests in the Order Details	System Admin, Lead Teacher	User must be able to view order details once the user select the order request in order details.
POS-SOR-06	Student Order Request	View and Add Order Notes	System Admin	User must be able to add and view order notes.
POS-SOR-07	Student Order Request	Save Changes in Order Summary	System Admin	User must be able to save the changes in the Order Summary.
POS-SOR-08	Student Order Request	Update Current & Available Balance	System Admin	System must be able to update the current & available balance of the student based on the student order.
POS-SOR-09	Student Order Request	Cancel Order	System Admin	User must be able to cancel orders of any status inside the
<b>Pending Order</b>				
POS-SOR-13-00	Student Order Request - Pending Request	View Pending Order Request List	HST, System Admin	User must be able to Approve Pending Order Request by
POS-SOR-13-00-01	Student Order Request - Pending Request	Approve Pending Approval Order in Order list	HST, System Admin	User must be able to approve orders in order list.
POS-SOR-13-03	Student Order Request - Pending Request	Approve Pending Approval Order in Order detail	HST, System Admin	User must be able to approve Pending Approval Order in Order Detail page.
<b>HST Approved</b>				
POS-SOR-14-00	Student Order Request - HST Approved	View HST Approved Order Request List	HST, System Admin, Lead Teacher	User must be able to HST Approve Order Request, by selecting HST Approved Card.
POS-SOR-14-01	Student Order Request - HST Approved	Assign HST Approved Order in Order list	HST, System Admin	User must be able to assign to self or to other processors of orders in order list.
POS-SOR-14-02	Student Order Request - HST Approved	Assign HST Approved Order in Order Details	HST, System Admin	User must be able to assign to self or to other processors of orders in the order details page.
POS-SOR-14-03	Student Order Request - HST Approved	Submit for SA Approval	HST, System Admin	User must be able to submit to School Admin for Approval.
POS-SOR-14-04	Student Order Request - HST Approved	Mark the HST Approved Order	HST, System Admin	User must be able to Mark status of the order.
POS-SOR-14-04-01	Student Order Request - HST Approved	View Park Status in Order details and Order List	HST, System Admin	User must be able to view the Park status of the HST Approved Order.
<b>SA Approval</b>				
POS-SOR-15-00	Student Order Request - For SA Approval	View For SA Approval Orders in the Order List	System Admin, Lead Teacher	User must be able to view For SA Approval list in the Order List by selecting SA Approval Card.
POS-SOR-15-01	Student Order Request - For SA Approval	Assign For SA Approval Orders in Order list	System Admin	User must be able to assign to self or orders in the order list.
POS-SOR-15-02	Student Order Request - For SA Approval	Assign For SA Approval Filter in Order list	System Admin	User must be able to filter the list of orders based on SA Assignment.
POS-SOR-15-03	Student Order Request - For SA Approval	Approve For SA Approval Order in Order Details	System Admin	User must be able to assign to self of orders in the order details page.
POS-SOR-15-04	Student Order Request - For SA Approval	Approve For SA Approval Order	System Admin	User must be able to approve/unapproved and cancel the order.
POS-SOR-15-05	Student Order Request - For SA Approval	View SA Approval Status in Order Details Page	System Admin	User must be able to view the SA Approval Status of the Order.
<b>Processing</b>				
POS-SOR-16-00	Student Order Request - Processing	View Processing Order Request List	System Admin, Lead Teacher	User must be able to view Processing Orders in the order list by selecting Processing Card.
POS-SOR-16-03	Student Order Request - Processing	Unassign Processing Order in Order Details	System Admin	User must be able to unassign of an order in the order details page.

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POS-SOR-16-04	Student Order Request - Processing	Submit for SA Approval	System Admin	User must be able to submit to School Admin for Approval
POS-SOR-16-13	Student Order Request - Processing	View Park Status	System Admin	User must be able to view the Park status of the Processing Order
POS-SOR-16-14	Student Order Request - Processing	Submit for SV Approval	System Admin	User must be able to submit for SV Approval
<b>Processed</b>				
POS-SOR-17-00	Student Order Request - Processed	View Processed Order Request List	System Admin, Lead Teacher	User must be able to view Processed Orders in the order list by selecting Processed Card
POS-SOR-17-01	Student Order Request - Processed	View Processed Order Request in the Order Details	System Admin, Lead Teacher	User must be able to view and edit order details
POS-SOR-17-02	Student Order Request - Processed	View Processed (Certificate) Order Request in the Order Details	System Admin, Lead Teacher	User must be able to view and edit order details
POS-SOR-17-04	Student Order Request - Processed	Add Invoice Details for Product & Service Order Type	System Admin	User must be able to input Invoice details for Product & Service Order Type
POS-SOR-17-05	Student Order Request - Processed	Invoice the Processed Order	System Admin	User must be able to invoice the order
POS-SOR-17-06	Student Order Request - Processed	Audit the Processed Order	System Admin	User must be able to audit the processed order
POS-SOR-17-07	Student Order Request - Processed	Invoice the Processed (Certificate) Order	System Admin	User must be able to invoice the order
POS-SOR-17-08	Student Order Request - Processed	Update Available & Current Balance	System Admin	System must be able to change the available balance of the system
POS-SOR-17-09	Student Order Request - Processed	Resend Certificate Email	System Admin	User must be able to resend certificate email
<b>Invoiced</b>				
<b>For Product &amp; Service Only</b>				
POS-SOR-18-00	Student Order Request - Invoiced	View Invoiced Order Request List	System Admin, Lead Teacher	User must be able to view Invoiced Orders in the order list by selecting Invoiced Card
POS-SOR-18-02	Student Order Request - Invoiced	Credit Memo	System Admin	User must be able to view and select the Credit Memo for the Invoiced Order
POS-SOR-18-03	Student Order Request - Invoiced	Edit Invoice	System Admin	Partial Invoice details must be input
POS-SOR-18-04	Student Order Request - Invoiced	Download Certificate	System Admin	Certificate must be downloadable
POS-SOR-18-05	Student Order Request - Invoiced	Audit the order	System Admin	User must be able to Audit the Invoiced Order
POS-SOR-18-06	Student Order Request - Invoiced	Invoice Status	System Admin	System must be able to display the invoiced
<b>Audited</b>				
<b>Tech Orders &amp; EOA</b>				
POS-SOR-19-00	Student Order Request - Audited	View Audited Order Request List	System Admin, Lead Teacher	User must be able to view Audited Orders in the order list by selecting Audited Card
POS-SOR-19-01	Student Order Request - Audited	View Details		Invoice Details must be viewable
POS-SOR-19-02	Student Order Request - Audited	Edit Invoice		Invoice Details must be input
POS-SOR-19-03	Student Order Request - Audited	Upload Files		User must be able to upload doc, jpeg, pdf in order details page
POS-SOR-19-04	Student Order Request - Audited	Adjust Order Item	System Admin	User must be able to adjust the amount of the item
<b>Verified</b>				
POS-SOR-20-00	Student Order Request - Verified	View Verified Order Request List	System Admin, Lead Teacher	User must be able to view Verified Orders in the order list by selecting Verified Card
POS-SOR-20-02	Student Order Request - Verified	Adjust Order Item	System Admin	User must be able to adjust the amount of the item
POS-SOR-20-03	Student Order Request - Verified	Edit Invoice	System Admin	Partial Invoice details must be input
POS-SOR-20-04	Student Order Request - Verified	Download Certificate	System Admin	Certificate must be downloadable
POS-SOR-20-05	Student Order Request - Verified	Upload Document		A file must be uploaded
POS-SOR-20-06	Student Order Request - Verified	Download Document		Uploaded file must be downloadable
POS-SOR-20-07	Student Order Request - Verified	Delete Document		Uploaded file must be deletable
POS-SOR-20-08	Student Order Request - Verified	Audit the Verified Order	System Admin	User must be able to audit the verified order
<b>Cancelled</b>				
POS-SOR-21-00	Student Order Request - Cancelled	View Cancelled Order Request	System Admin, Lead Teacher	User must be able to view Cancelled Orders in order list by selecting Cancelled Card
POS-SOR-21-01	Student Order Request - Cancelled	View Cancelled Order Request in the Order Details	System Admin, Lead Teacher	User must be able to view order details
<b>For SV Approval</b>				
POS-SOR-22-00	Student Order Request - For SV Approval	View For SV Approval Orders in the Order Details	Supervisor: System Admin, Lead Teacher	User must be able to view For SV Approval list by selecting SV Approval Card
POS-SOR-22-03	Student Order Request - For SV Approval	Approve SV Approval Order in Order detail page	Supervisor: System Admin	User must be able to approve SV Approval Order in Order Detail page
POS-SOR-22-04	Student Order Request - For SV Approval	Approve For SA Approval Order	Supervisor: System Admin	User must be able to approve/unapproved and cancel the order
<b>Product</b>				
POS-SOR-23	Student Order Request	View Order Summary in all of the order status	System Admin, Lead Teacher	System must be able to display details for Service Order Type
POS-SOR-24	Student Order Request	Edit Order for Product Order Type		User must be able to edit the Order summary
<b>Service</b>				
POS-SOR-25	Student Order Request	View Order Summary in all of the order status	System Admin, Lead Teacher	System must be able to display details for Service Order Type
POS-SOR-26	Student Order Request	Edit Order for Service Order Type		User must be able to edit the Order summary
<b>Tech Orders, Tech 3010, Tech 1510, Tech 6500, Tech CTE</b>				
POS-SOR-27	Student Order Request	View Order Summary in all of the order status	System Admin, Lead Teacher	System must be able to display details for Service Order Type
POS-SOR-28	Student Order Request	Edit Order for Service Order Type	System Admin	User must be able to edit the Order summary
<b>Student</b>				
POS-STUD-01-00	Students	List of Students	System Admin, Lead Teacher	User must be able to view, and search student. This also includes the pagination
POS-STUD-01-01	Students	Color Coding for student		User must be able to view the difference in color of Student Name
POS-STUD-01-02	Students	Student Notes		User must be able to view and add student notes
POS-STUD-02	Students	Search By Filter		User be able to select the Search By Filter
POS-STUD-03	Students	Search As Filter		User must be able to select Search As Filter. This filter is based on user role especially for multiple
POS-STUD-04	Students	Search Bar		User must be able to input keywords based on filters
POS-STUD-05-00	Students	Student Details [5]	System Admin	User must be able to Select and view the student information
POS-STUD-05-01	Students	[6]		User must be able view and add student notes
POS-STUD-05-02	Students	Student Notes		User must be able to view and add guardian notes
POS-STUD-05-03	Students	Reset Password for the Guardian		User must be able to reset the password
POS-STUD-05-04	Students	School Year Filter		User must be able to select school year
POS-STUD-05-05	Students	Fund Adjustment	System Admin	User must be able to adjust student fund
POS-STUD-05-06	Students	View Request Order ID		User must be able to select Order Request ID
POS-STUD-05-07	Students	Upload Files		User must be able to upload files
POS-STUD-05-08	Student Inventory	Search Inventory		User must be able to view and select search bar in Inventory
POS-STUD-05-09	Students	Search File Name		User must be able to search File Name
POS-STUD-05-10	Student Inventory	Download Inventory	System Admin, Lead Teacher	User must be able to download inventory based on SY filter
POS-STUD-05-11	Students	Create Request	System Admin	User must be able to create request of order
POS-STUD-06	Students	Student Hold Account	System Admin	User must be able to Hold Student Account
POS-STUD-07	Students	Merge Students	System Admin	User must be able to Merge Students
POS-STUD-08	Students	Download Student Details	System Admin	User must be able to Download Student Details
POS-STUD-09	Students	Tag Population	System Admin	User must be able to add/update Population
POS-STUD-10	Students	Create Request	System Admin	User must be able to create request of order
<b>Staff Order Request</b>				
POS-STOR-01	Staff Order Request	View List of Orders	Admin, Tech Processor, Teacher, Guardian,	User must be able to view the list of orders
POS-STOR-02	Staff Order Request	View Card for every Order Statuses		User must be able to view the Card for every Order Statuses
POS-STOR-03	Staff Order Request	View and Select Create Order Button		User must be able to view and Select "Create Order" Button
POS-STOR-03-01-01	Staff Order Request	Staff Selection List	Admin	User must be able to display the list of staffs
POS-STOR-03-01-02	Staff Order Request	Staff Selection Search Box		User must be able view and search
POS-STOR-03-02-00	Staff Order Request	Order Request Info - Staff Selection		User must be able to view the Staff Detail that was selected by the user
POS-STOR-03-02-01	Staff Order Request	List of Tech Items		List of Tech Items must be displayed after selecting Tech Staff as Order Type
POS-STOR-03-02-02	Staff Order Request	Delivery Type Selection		User must be able to choose type of delivery
POS-STOR-03-04	Staff Order Request	Order Request Info - Order Request Information		User must be able to create requirements in creating order request
POS-STOR-03-05-00	Staff Order Request	Order Request Info - Add Order Items		User must be able to create Order Item's
POS-STOR-03-05-01	Staff Order Request	Add Order Item - Able to select Item for Tech Staff		
POS-STOR-03-06	Staff Order Request	Order Request Info - Shipping Details		User must be able to view Shipping Details
POS-STOR-03-07-00	Staff Order Request	Order Request Info - Order Summary		User must be able to view the summary of orders
POS-STOR-03-07-01	Staff Order Request	Item URL		The item must have a URL that will redirect the user to a new tab
<b>Staffs</b>				
POS-ST-01	Staffs	View and Search Staff		User must be able to search staff and view staff list
POS-ST-02-00	Staffs	View Staff Details		User must be able to view staff details
POS-ST-02-01	Staffs	School Year Filter		User must be able to select the school year
POS-ST-02-02	Staffs	Staff Order Request ID		Staff Order Request ID must be able to select by the user to redirect to the Order Detail Page
POS-ST-03-01	Staffs	Download Inventory		User must be able to download inventory based on School Year filter
POS-ST-03-02	Staffs	Create Staff Order		User must be able to create staff order
POS-STOR-04	Staffs	View and Select Search By		User must be able to view and select what type of filter can be use in searching
POS-STOR-05	Staffs	View and Select Order Type		User must be able to view and select "Select Order Type" filter
POS-STOR-06	Staffs	View and Select the School Year		User must be able to view and select School Year
POS-STOR-07	Staffs	View and Search in Search Box		User must be able to view and type in Search Box
POS-STOR-08	Staffs	View and Select Clear Button		User must be able to view and select "Clear Filter" button
POS-STOR-09	Staffs	Pagination		User must be able to change the Page Size, and let the user go the next page
POS-STOR-10	Staffs	View and Select Staff Status		User must be able to view and select Staff Status for filter

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POS-STOR-11	Staffs	View and Select Assigned to Self		User must be able to tick the box if the list of orders whether assigned to themselves or not
POS-STOR-12	Staffs	View Order Requests in the Order Details		User must be able to view order details once the user select the order request in order details
POS-STOR-13	Staffs	View and Add Order Notes		User must be able to add and view order notes
POS-STOR-14	Staffs	Save Changes in Order Summary		User must be able to add and save changes in order summary in all statuses except SA Approval, Verified, and Cancelled status
POS-STOR-15	Staffs	Cancel Order		User must be able to cancel orders of any status inside the order details page
<b>Pending</b>				
POS-STOR-16-01	Staff Order Request - Pending	View Pending Order Request in the Order Details	System Admin	User must be able to view order details
POS-STOR-16-02	Staff Order Request - Pending	Save Changes in Order Summary	System Admin	User must be able to edit Order Summary and save the changes
POS-STOR-16-03	Staff Order Request - Pending	Assign to Self	System Admin	User must be able to assign to self of orders in the order details page
POS-STOR-16-04	Staff Order Request - Pending	Add and view notes	System Admin	User must be able to view and add notes
POS-STOR-16-05	Staff Order Request - Pending	Submit for SA Approval	System Admin	User must be able to submit to School Admin for Approval
POS-STOR-16-06	Staff Order Request - Pending	Submit for SV Approval	System Admin	User must be able to submit to Supervisor for Approval
POS-STOR-16-07	Staff Order Request - Pending	Park the Pending Order	System Admin	User must be able to Park status of the order
POS-STOR-16-08	Staff Order Request - Pending	View Park Status	System Admin	User must be able to view the Park status of the HST Approved Order
POS-STOR-16-09	Staff Order Request - Pending	Add Order Item	System Admin	User must be able to add Order Item
<b>For SA Approval</b>				
POS-SOR-17-01	Staff Order Request - For SA Approval	Assign For SA Approval Orders in Staff Order Details	School Admin	User must be able to assign to self of orders in order list
POS-SOR-17-02	Staff Order Request - For SA Approval	Assign For SA Approval Filter Orders in Order list	School Admin	User must be able to filter the list of orders based on SA Assignment
POS-SOR-17-03	Staff Order Request - For SA Approval	View For SA Approval Order Request in the Order Details	System Admin, Lead Teacher	User must be able to view order details
POS-SOR-17-04	Staff Order Request - For SA Approval	Add and view notes	System Admin	User must be able to view and add notes
POS-SOR-17-05	Staff Order Request - For SA Approval	Assign For SA Approval Order in Order Details	School Admin	User must be able to assign to self of orders in the order details page
POS-SOR-17-06	Staff Order Request - For SA Approval	Approve For SA Approval Order	School Admin	User must be able to approve/ unapproved and cancel the order
<b>Processing</b>				
POS-SOR-18-00	Staff Order Request - Processing	View Processing Order Request in the Order Details	System Admin, Lead Teacher	User must be able to view and edit order details
POS-SOR-18-01	Staff Order Request - Processing	Save and Edit Changes in Order Summary	System Admin	User must be able to edit in order details and save the changes
POS-SOR-18-02	Staff Order Request - Processing	Unassign Processing Order in Order Details	System Admin	User must be able to unassign an order in the order details page
POS-SOR-18-03	Staff Order Request - Processing	Add and view notes	System Admin	User must be able to view and add notes
POS-SOR-18-04	Staff Order Request - Processing	Process Order Item	System Admin	User must be able to Process Order Item
POS-SOR-18-05	Staff Order Request - Processing	View Park Status	System Admin	User must be able to view the Park status of the Processing Order
<b>For SV Approval</b>				
POS-SOR-19-00	Staff Order Request - For SV Approval	Assign For SV Approval Orders in Staff Order Details		User must be able to assign to self of orders in order list
POS-SOR-19-01	Staff Order Request - For SV Approval	Assign For SV Approval Filter Orders in Order list		User must be able to filter the list of orders based on SV Assignment
POS-SOR-19-02	Staff Order Request - For SV Approval	View For SV Approval Order Request in the Order Details		User must be able to view order details
POS-SOR-19-03	Staff Order Request - For SV Approval	Add and view notes		User must be able to view and add notes
POS-SOR-19-04	Staff Order Request - For SV Approval	Approve For SV Approval Order		User must be able to approve/ unapproved and cancel the order
POS-SOR-19-05	Staff Order Request - For SV Approval	Approve SV Order and Submit For SA Approval		User must be able to change its status into Processing Status
<b>Processed</b>				
POS-SOR-19-06	Staff Order Request - Processed	View Processed Order Request	System Admin, Lead Teacher	User must be able to view Processed Orders in order list
POS-SOR-19-07	Staff Order Request - Processed	Add and view notes	System Admin	User must be able to view and add notes
POS-SOR-19-08	Staff Order Request - Processed	Save and Edit Changes in Order Summary	System Admin	User must be able to edit in order details and save the changes
POS-SOR-19-09	Staff Order Request - Processed	View Processed Order Request in the Order Details	System Admin	User must be able to view and edit order details
POS-SOR-19-10	Staff Order Request - Processed	Save and Edit Changes in Order Summary	System Admin	User must be able to edit in order details and save the changes
POS-SOR-19-11	Staff Order Request - Processed	Item URL	System Admin	User must be able to select URL and redirect to another page
<b>Cancelled</b>				
POS-SOR-20-00	Staff Order Request - Cancelled	View Cancelled Order Request	System Admin	User must be able to view Cancelled Orders in order list
POS-SOR-20-01	Staff Order Request - Cancelled	Add and view notes	System Admin	User must be able to view and add notes
POS-SOR-20-02	Staff Order Request - Cancelled	View Cancelled Order Request in the Order Details	System Admin	User must be able to view order details
<b>Inventory</b>				
<b>Student Inventory</b>				
POS-IV-01	Student Inventory	View Inventory List	System Admin	User is able to view the Inventory List of Student Orders (including migrated orders)
POS-IV-02	Student Inventory	Dropdown Filter	System Admin	User is able to change filter of search in the dropdown
POS-IV-03	Student Inventory	Select a Student (Part of the Dropdown Filter)	System Admin	User is shown a modal where they search and select a student
POS-IV-04	Student Inventory	Download Inventory	System Admin	User is able to click download inventory button and download an excel file containing the list of inventory orders of the student selected
POS-IV-05	Student Inventory	Search	System Admin	User is able to search inventory items using search bar
POS-IV-06	Student Inventory	View Item Details	System Admin	User is able to click a row from the Inventory Table and see the Inventory Item Details Modal
POS-IV-07	Student Inventory	Consumable Checkbox	System Admin	User is able to check and uncheck consumable checkbox
POS-IV-08	Student Inventory	Partial Return	System Admin	User is able to change inventory item status to Partially Returned using the Partial Return button
POS-IV-09	Student Inventory	Return	System Admin	User is able to change inventory item status to Returned using the Return button
POS-IV-10	Student Inventory	Transfer	System Admin	User is able to transfer an inventory item to one of the student's siblings
POS-IV-11	Student Inventory	Edit [7]	System Admin	User is able to edit reason/comment field for migrated orders
POS-IV-12	Student Inventory	Adjust Inventory Amount [8]	System Admin	User is able to adjust inventory amount for migrated orders
POS-IV-13	Student Inventory	Pagination and Item Size	System Admin	User is able to change item size at the top of the page and change page displayed
<b>Staff Inventory</b>				
POS-IV-14	Staff Inventory	View Inventory List	System Admin	User is able to view the Inventory List of Staff Orders
POS-IV-15	Staff Inventory	Dropdown Filter	System Admin	User is able to change filter of search in the dropdown
POS-IV-16	Staff Inventory	Select a Staff (Part of the Dropdown Filter)	System Admin	User is able to select a Staff using the Select a staff dropdown option of the Search by Filter
POS-IV-17	Staff Inventory	Download Inventory	System Admin	User is able to click download inventory button and download an excel file containing the list of inventory orders of the student selected
POS-IV-18	Staff Inventory	Search	System Admin	User is able to search inventory items using search bar
POS-IV-19	Staff Inventory	View Inventory Item Modal	System Admin	User is able to click a row from the Inventory Table and see the Inventory Item Details Modal
POS-IV-20	Staff Inventory	Consumable Checkbox	System Admin	User is able to check and uncheck consumable checkbox
POS-IV-21	Staff Inventory	Partial Return	System Admin	User is able to change inventory item status to Partially Returned using the Partial Return button
POS-IV-22	Staff Inventory	Return	System Admin	User is able to change item size at the top of the page and change page displayed
<b>Money Card</b>				
POS-MC-01	Money Card	View Money Card	System Admin	User is able to view Money Card Table
POS-MC-02 [8]	Money Card	Adding Card	System Admin	User must be able to Add Card
POS-MC-03	Money Card	Activate/Deactivate Money Card	System Admin	User must be able to toggle a money card to activate or deactivate
POS-MC-04	Money Card	Edit Money Card	System Admin	User can edit Money Card details: Card Number, Card Name, Card Holder Name
<b>Vendor Details List [10]</b>				
POS-VDL-01	Vendor Details List	Status Card		Status of the vendor must be displayed by card
POS-VDL-02	Vendor Details List	Vendor list		Vendor list must be displayed
POS-VDL-02-01	Vendor Details List	Vendor Details	Vendor Details	Vendor Details must be displayed upon selecting the vendor name
POS-VDL-02-02	Vendor Details List	Show Tip	Vendor Tip	Vendor Tip is viewable in the vendor list upon selecting a question mark icon
POS-VDL-02-03	Vendor Details List	Vendor Notes	Vendor Notes	User must be able to add and view notes
POS-VDL-02-04	Vendor Details List	Sending Credentials for Service Order Type		Sending Credentials is possible in vendor list upon selecting the checkboxes
POS-VDL-02-05	Vendor Details List	Toggle for status of the vendor		A toggle button must be present to change the status of the vendor
POS-VDL-02-06	Vendor Details List	Update History		History in changes of vendor details must be viewable by the user upon selecting a certain date of updates
POS-VDL-03	Vendor Details List	Vendor Details		Vendor details must be able to display upon selecting the vendor name in the vendor list
POS-VDL-03-01	Vendor Details List	Edit Vendor Details for Product Order Type		Vendor Details is editable and will still be able to upload files
POS-VDL-03-02	Vendor Details List	Upload Certificate of Insurance		Certificate of Insurance must be uploaded
POS-VDL-03-03	Vendor Details List	Download Certificate of Insurance		Uploaded Certificate of Insurance must be downloadable
POS-VDL-03-04	Vendor Details List	Delete Certificate Insurance		There will be an option to delete the uploaded Certificate of Insurance
POS-VDL-03-05	Vendor Details List	Status of the Vendor		Ability to change the status of the vendor in Approved Vendor Details List
POS-VDL-03-06	Vendor Details List	Deactivate the Vendor		Status of the vendor must be able to deactivate by the user
POS-VDL-03-07	Vendor Details List	Save Changes in Vendor Details		Changes in the vendor details must be saved
POS-VDL-03-08	Vendor Details List	Download Vendor details		Ability to download vendor details
POS-VDL-04	Vendor Details List	Search By Filter		A Search Filter must be an option for the user to use in viewing and searching the vendor

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POS-VDL-05	Vendor Details List	Order Type Filter		An order type filter must be an option for the user to use in viewing and searching the vendor
POS-VDL-06	Vendor Details List	Search Box		Search Box must be visible and let the user input the keywords based on filters
POS-VDL-07	Vendor Details List	Clear Filter		Clear Filter must be able to remove all of the filter applied in the POS
POS-VDL-08	Vendor Details List	Add Approved Vendor		User must be able to add new Approved Vendor
POS-VDL-08-01	Vendor Details List		Vendor Details for Product	User must be able to input details of Vendor that has Product Order Type
POS-VDL-08-02	Vendor Details List		Input Details of Vendor	User must be able to input details of Vendor that has Service Order Type
POS-VDL-08-03	Vendor Details List		Detailed List of Services and Prices	<p>Ability to add pricing item</p> <p>User must be able to input details including the links like Amazon etc</p> <p>If the user orders from this type of vendor, user will be redirected to the vendor (Amazon). The user can order anything from there using details provided by the school. Once the user orders, system will redirect him back to the POS and the system will provide order id and a Pending status order</p>
POS-VDL-08-04	Vendor Details List		Vendor Details for Punchout that has third-party system	
POS-VDL-08-05	Vendor Details List		Save Details	User must be able to save the details of the order
POS-VDL-09	Vendor Details List	Download Insurance Expiration		Generate Expiring and Expired Insurances Reports
<b>Approved Vendors</b>				
POS-AV-01	Approved Vendors	List of Approved Vendors	System Admin, Lead Teacher	Approved Vendors list must be displayed
POS-AV-01-01	Approved Vendors		Vendor Details	Vendor Details must be displayed upon selecting the vendor name
POS-AV-01-02	Approved Vendors		Vendor URL	Vendor URL must be selectable and redirect the user into a new tab to display the link of vendor
POS-AV-01-03	Approved Vendors		Show Tip	Vendor Tip is viewable in the vendor list upon selecting a question mark icon
POS-AV-02	Approved Vendors	Search By Filter		A search by filter must be an option for the user to use in viewing and searching the vendor
POS-AV-03	Approved Vendors	Order Type Filter		An order type filter must be an option for the user to use in viewing and searching the vendor
POS-AV-04-00	Approved Vendors	View As Filter		View As Filter is a type of filter for multi-role users that filters the Approved details list
POS-AV-04-01	Approved Vendors		Zip Code Filter	User must be able to input the Zip code of the vendor
POS-AV-04-02	Approved Vendors		View Maps	User must be able to select View Map and the system must be able to display the map with the pin location of the searched vendor. Map shall also display the nearby locations of other vendors
POS-AV-05	Approved Vendors	Search Approved Vendor		User must be able to find the Approved Vendor based on filters
POS-AV-06	Approved Vendors	Clear Filter		Clear Filter must be able to remove all of the filter applied in the POS
POS-AV-07	Approved Vendors	Update Vendor Details	System Admin	User must be able to update Vendor Details
POS-AV-07-01	Approved Vendors		Edit Vendor Details for Product Order Type	Vendor Details is editable and will still be able to upload files. Vendor Tip is also customizable
POS-AV-07-02	Approved Vendors		Upload Certificate of Insurance	Certificate of Insurance must be uploaded
POS-AV-07-03	Approved Vendors		Download Certificate of Insurance	Uploaded Certificate of Insurance must be downloadable
POS-AV-07-04	Approved Vendors		Delete Certificate Insurance	There will be an option to delete the uploaded Certificate of Insurance
POS-AV-07-05	Approved Vendors		Status of the Vendor	Ability to change the status of the vendor in Approved Vendor Details List
POS-AV-07-06	Approved Vendors		Deactivate the Vendor	Status of the vendor must be able to deactivate by the user
POS-AV-07-07	Approved Vendors		Save Changes in Vendor Details	Changes in the vendor details must be saved
POS-AV-07-08	Approved Vendors		Download Vendor details	Ability to download vendor details
<b>OSP</b>				
<b>Subscription</b>				
POS-OSP-01-00	OSP - Subscription	View Subscription List		User must be able to view Subscription List with the details
POS-OSP-01-01	OSP - Subscription		Download Subscription	A subscription item must be downloadable from the system
POS-OSP-01-02	OSP - Subscription		Process Subscription	A subscription item must be processed by the user
	OSP - Subscription		Approve OSP Order	OSP A la Carte must be able to approve any HST Approved Order
POS-OSP-02-00	OSP - Subscription	Download Subscriptions		User must be able to download subscriptions
POS-OSP-02-01	OSP - Subscription		Download Pending	Download Subscription Items that are currently in Pending Approval Order status
POS-OSP-02-02	OSP - Subscription		Download Download HST Approved	Download Subscription Items that are currently in HST Approved Order status
POS-OSP-02-03	OSP - Subscription		Download Processed	Download Subscription Items that are currently in Process Order status
POS-OSP-02-04	OSP - Subscription		Download All	Download Subscription Items regardless of Order status
POS-OSP-03	OSP - Subscription	Search Subscription		User must be able to search subscription
POS-OSP-04	OSP - Subscription	Filter in OSP		User must be able to select the school year, and the start and end date that will filter the list of Approved Vendors
POS-AV-05	OSP - Subscription	Search Approved Vendor		
POS-AV-06	OSP - Subscription	Clear Filter		Clear Filter must be able to remove all of the filter applied in the POS
<b>Subscription Management</b>				
POS-OSP-07-00	OSP - Subscription Management	View Subscription list		User must be able to view Subscription List with the details
POS-OSP-07-01	OSP - Subscription Management		Update Subscription Item Price	The price of Subscription item must be able to update or change the price
POS-OSP-07-02	OSP - Subscription Management		Edit Subscription School	It let the user choose what schools make this subscription item available
POS-OSP-07-03	OSP - Subscription Management		Toggle Subscription Item Status	It enables/disables the status of the Subscription item
POS-OSP-08	OSP - Subscription Management	Search A la Carte Subscription		User must be able to search subscription
<b>Report</b>				
<b>Front End Filtering</b>				
POS-REP-01	Reports - Front End Filtering	View and Select Report Type	System Admin	User must be able to view and select which report type must be downloaded
POS-REP-02	Reports - Front End Filtering	Download Beginning Balance Report, Orders (MC) Without Receipt Report, Planner Report, Processed Audited Orders Report, Tech Orders Report	System Admin	User must be able to download Beginning Balance Report
POS-REP-02-01	Reports - Front End Filtering		Select School Year	Reports must be downloaded based on covered selected school year
POS-REP-03	Reports - Front End Filtering	Download Learning Site History Report	System Admin	User must be able to download Learning Site History
POS-REP-03-01	Reports - Front End Filtering		Select School Year	Reports must be downloaded based on covered selected school year
POS-REP-03-0200	Reports - Front End Filtering	Report Selection for specific students or for all students		An option to download reports from specific students or all of the students
POS-REP-03-0201	Reports - Front End Filtering	Search Student Name or District ID		Student Name or District ID must be searchable
POS-REP-03-0202	Reports - Front End Filtering	Select Student		Student Name must be able to select by the user and the system will list down the selected students
POS-REP-04-00	Reports - Front End Filtering	Select Processed Order Request Report, Processor Report, Productivity Report, VT Order Assignment Report, Vendor Invoicing Performance Report, Verify Order Report	System Admin	User must be able to download Processed Order Request Report
POS-REP-04-01	Reports - Front End Filtering		Date Coverage	Coverage date of the report must be selected
POS-REP-04-02	Reports - Front End Filtering	Report Selection for specific employees or for all employees		An option to download reports from specific employees or all of the employees
POS-REP-04-022	Reports - Front End Filtering	Search Employee Name or email		Employee Name or Email must be searchable
POS-REP-04-023	Reports - Front End Filtering	Select Employee		Employee Name must be able to select by the user and the system will list down the selected employee's
POS-REP-05	Reports - Front End Filtering	Select Processor Orders Report	System Admin	User must be able to download Processor Orders Report
POS-REP-05-01	Reports - Front End Filtering		Search Processor	Processor Name or Email must be searchable
POS-REP-05-02	Reports - Front End Filtering		Select Processor	Processor Name must be able to select by the user and the system will list down the selected processors
POS-REP-06-00	Reports - Front End Filtering	Select Student Fund Report	System Admin	User must be able to download State Fund Report
POS-REP-06-01	Reports - Front End Filtering		Option to download student with or without fund report	A radio button for Student with Fund Drop and Student without Fund Drop must be able to select by the user
POS-REP-07-00	Reports - Front End Filtering	Select Student School Transfer Report	System Admin	User must be able to download Student School Transfer Report
POS-REP-07-01	Reports - Front End Filtering		Select School Year	Reports must be downloaded based on covered selected school year
POS-REP-07-02	Reports - Front End Filtering		Select Transfer Option	User must be able to select "Transferred FROM School" or "Transferred TO School"
POS-REP-08	Reports - Front End Filtering	Select Submitted Orders Daily Count Report	System Admin	User must be able to download Submitted Orders Daily Count Report
POS-REP-08-01	Reports - Front End Filtering		Select Coverage Date	Coverage date of the report must be selected that includes month and year
POS-REP-08-02	Reports - Front End Filtering		Order Type of Report	Ability to choose between All orders or Product and Service Only
POS-REP-09-00	Reports - Front End Filtering	Select Unprocessed Orders Report, Vendors with Expired Insurances Report	System Admin	User must be able to download Unprocessed Orders Report
POS-REP-09-01	Reports - Front End Filtering		Select All Vendor or Selected Vendor/s	Ability to choose All Vendor or Selected Vendor/s for downloading specific report
POS-REP-09-02	Reports - Front End Filtering		Search Vendor	Vendor Name must be searchable
POS-REP-09-03	Reports - Front End Filtering		Select Vendor	Vendor Name must be able to select by the user and the system will list down the selected vendor/s
<b>Downloading Reports</b>				
		Report From Punchout		Punchout downloaded file must have the correct data.
POS-REP-10-00		Beginning Balance Report		Beginning Balance Report: downloaded file must have the correct data.
POS-REP-10-01		Learning Site History Report		Learning Site History Report: downloaded file must have the correct data.
POS-REP-10-02		Orders (MC) Without Receipt Report		Orders (MC) Without Receipt Report: downloaded file must have the correct data.
POS-REP-10-03		Planner Report		Planner Reports: downloaded file must have the correct data.

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POS-REP-10-04		Processed Order Request Report			Processed Order Request Report downloaded file must have the correct data.
POS-REP-10-05		Processed-Audited Orders Report			Processed-Audited Orders Reports downloaded file must have the correct data.
POS-REP-10-06		Processor Orders Report			Processor Orders Report downloaded file must have the correct data.
POS-REP-10-07		Processor Report			Processor Report downloaded file must have the correct data.
POS-REP-10-08		Productivity Report			Productivity Report downloaded file must have the correct data.
POS-REP-10-09		Rejected Punchout Order Items Report			Rejected Punchout Order Items Report downloaded file must have the correct data.
POS-REP-10-10		Student Fund Report			Student Fund Report downloaded file must have the correct data.
POS-REP-10-11		Student School Transfer Report			Student School Transfer Report downloaded file must have the correct data.
POS-REP-10-12		Submitted Orders Daily Count Report			Submitted Orders Daily Count Report downloaded file must have the correct data.
POS-REP-10-13		Tech Orders Report			Tech Orders Report downloaded file must have the correct data.
POS-REP-10-14		Unprocessed Orders Report			Unprocessed Orders Report downloaded file must have the correct data.
POS-REP-10-15		VT Order Assignment Report			VT Order Assignment Report downloaded file must have the correct data.
POS-REP-10-16		Vendor Invoicing Performance Report			Vendor Invoicing Performance Report downloaded file must have the correct data.
POS-REP-10-17		Vendors with Expired Insurances Report			Vendors with Expired Insurances Report downloaded file must have the correct data.
POS-REP-10-18		Vendors with Expiring Insurances Report			Vendors with Expiring Insurances Report downloaded file must have the correct data.
POS-REP-10-19		Verified Order Productivity Report			Verified Order Productivity Report downloaded file must have the correct data.
POS-REP-10-20		Verified Order Report			Verified Order Report downloaded file must have the correct data.
<b>Videos</b>					
				Auditor, Guardian, Teacher, Lead Teacher, Admin Teacher, School Admin, School Admin Supervisor, Processor, Supervisor, Vendor Invoicing, Verification Team, Verification Team Supervisor, System Admin	
POS-V01-00	Videos	List of Videos			User must be able to view list of videos
POS-V01-01	Videos		Video Title	System Admin, Lead Teacher	User must be able to select video and redirect the user to a new tab
POS-V02	Videos	Search Video		System Admin, Lead Teacher	User must be able to search video by title
POS-V03	Videos	Toggle Status		System Admin	Status of the Video must be able to enable/disable
POS-V04	Videos	Edit Video Details			Video Details is editable and must be saved
POS-V05	Videos	Status Filter			Status Filter must contain All, Active, and Inactive
<b>Tech Configurations</b>					
POS-TC-01	Tech Configuration	List of Tech Items		Tech Processor, System Admin	List of tech items must be displayed along with other details
POS-TC-02	Tech Configuration	Search Tech Item		Tech Processor, System Admin	Tech Item must be able to search by Item Name
POS-TC-03	Tech Configuration	Tech Order Batch Process		Tech Processor, System Admin	User must be able to Upload HST Approved Tech Orders to Process
POS-TC-04	Tech Configuration	Add Tech Item Manually		Tech Processor, System Admin	User must be able to add tech item
POS-TC-05	Tech Configuration	Download Template		Tech Processor, System Admin	Template for Tech Item must be downloadable
POS-TC-06	Tech Configuration - Batch Process Upload	Add Tech Item by Batch		Tech Processor, System Admin	User must be able to add tech items by batch
POS-TC-07-00	Tech Configuration	Actions		Tech Processor, System Admin	Contains different functions to edit, and update the details of tech item
POS-TC-07-01	Tech Configuration		View Uploaded File	Tech Processor, System Admin	Uploaded file must be viewable
POS-TC-07-02	Tech Configuration		Upload Attachment	Tech Processor, System Admin	An attachment file for tech item must be uploadable
POS-TC-07-03	Tech Configuration		Download uploaded file	Tech Processor, System Admin	Uploaded file must be downloadable
POS-TC-07-04	Tech Configuration		Delete uploaded file	Tech Processor, System Admin	Uploaded file must be able to remove from POS
POS-TC-07-05	Tech Configuration		Update Tech Price	Tech Processor, System Admin	Price of tech item must be updated
POS-TC-07-06	Tech Configuration		Update Tech Item Details	Tech Processor, System Admin	File must be updated in a modal
POS-TC-07-061	Tech Configuration		Upload attachment file	Tech Processor, System Admin	File must be updated in a modal
POS-TC-07-07	Tech Configuration		Toggle Tech Item Status	Tech Processor, System Admin	A toggle button for the status of the tech item
<b>Configuration</b>					
<b>Upload</b>					
<b>Enrichment</b>					
POS-CON-01-00	Enrichment School Configuration	Uploading Students		System Admin	User must be able to upload students
POS-CON-01-01	Enrichment School Configuration		Download Template		Template for Enrichment Report must be downloadable
POS-CON-01-02	Enrichment School Configuration		Upload Enrichment		Upload Enrichment Report from the user's device
POS-CON-01-03	Enrichment School Configuration		Upload Military Family		Upload Military Family Enrichment Report from the user's device
POS-CON-01-04	Enrichment School Configuration		Upload SPED		Upload SPED Enrichment Report from the user's device
POS-CON-02	Enrichment School Configuration	Search by Name or Email			Name or email of Student or Teacher or Guardian must be searchable
POS-CON-03	Enrichment School Configuration	Pagination			Change the Page size of the list
POS-CON-04	Enrichment School Configuration	View Student Enrichment List		System Admin	User must be able to view the list of student enrichment details
POS-CON-05	Enrichment School Configuration	Toggle Student Status		System Admin	A toggle button for the status of the student
POS-CON-06	Enrichment School Configuration	View Guardian Enrichment List		System Admin	User must be able to view the list of guardian enrichment details
POS-CON-07	Enrichment School Configuration	View Teacher Enrichment List		System Admin	User must be able to view the list of teacher enrichment details
<b>Employees</b>					
<b>User Management</b>					
POS-UM-01-00	User Management	Select a User			User must be able to select, view and create different user roles
POS-UM-01-01	User Management		Enable Status		User must be able to view the toggle button for the status of the user
POS-UM-01-02	User Management		Select/Unselect Modules		- User must be able to view the checked modules which indicate that these modules are available to the selected User - User must be able to tick/untick the boxes of modules - The modules that have tick boxes must be available in the user role that the user selected before
POS-UM-01-03	User Management		Select User Role		User must be able to select a user role
POS-UM-01-04	User Management		Select/Unselect Features		User must be able to view the available features in a module - User must be able to view the checked features which indicate that these features are available to the selected User - User must be able to tick/untick the boxes of modules - The features that have tick boxes must be available in the user role that the user selected before
POS-UM-01-05	User Management		Select Feature		User must be able to change the name of the role
POS-UM-02	User Management	Edit User Name			User must be able to change the name of the role
POS-UM-03	User Management	Save			User must be able to save the changes in the user management
POS-UM-04	User Management	Enable/Disable MFA			System must be able to apply these changes in all of the registered account
POS-UM-05	User Management	Search & Select Account			User must be able to activate/deactivate the MFA in a specific user role
<b>Fund Management</b>					
POS-CON-12	Fund Management	View Fund Fund Management List		System Admin	User must be able to view fund management list
POS-CON-13	Fund Management	School Year Filter			School Year filter must be an available option in viewing the Fund Management List
POS-CON-14	Fund Management	School Filter			School filter must be an available option in viewing the Fund Management List
POS-CON-15-00	Fund Management	Upload Fund Management		System Admin	
POS-CON-15-01	Fund Management		Download Template		Template for Enrichment Report must be downloadable
POS-CON-15-02	Fund Management		Uploading Fund	System Admin	User must be able to upload employees
POS-CON-15-03	Fund Management		Choose School Year		School Year must be selected first before uploading Fund
	Fund Management	View Student List			User must be able to view and select a student
	Fund Management	Add Fund			User must be able to add funds to the student manually
POS-CON-16	Fund Management	Search Learning Center			Learning Center must be searchable
POS-CON-17	Fund Management	Toggle Learning Center Status		System Admin	A toggle button for the status of the learning center
<b>Accounts</b>					
POS-CON-18	Accounts Password Management	Role Filter			A role filter must be available to change the list of account
POS-CON-19	Accounts Password Management	Search Account			Account must be searchable through name or email
POS-CON-20	Accounts Password Management	Edit Password details		System Admin	User must be able to view and configure the passwords of employees and guardians
<b>Staff</b>					
POS-CON-21	Staff Management	Search Staff			Staff email must be searchable
POS-CON-22	Staff Management	Download Staff Template			Template for Staff must be downloadable
POS-CON-23	Staff Management	Upload Staffs		System Admin	User must be able to upload staff list
POS-CON-24	Staff Management	View Staff List		System Admin	User must be able to view and search the staff list
POS-CON-25	Staff Management	Status Button			A toggle button that will be able/unable for staff to do staff ordering
<b>FAQ</b>					
POS-CON-25-00	FAQ Management	Create FAQ			A functional button that will redirect the user into another page to create FAQ
POS-CON-25-01	FAQ Management		Input Details		Details of FAQ must be filled up includes URL and Title

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POS-CON-25-02	FAQ Management		Upload Files		Files must be uploaded and must be one upload per language
POS-CON-26-00	FAQ Management	View FAQ		System Admin	User must be able to view FAQ Details, and FAQ History
POS-CON-26-01	FAQ Management		Edit FAQ		Editing FAQ covers changing the details and uploading file
POS-CON-26-02	FAQ Management		View FAQ File		The uploaded FAQ file is viewable
POS-CON-26-03	FAQ Management		Remove FAQ File		The uploaded FAQ file must be removable
POS-CON-26-04	FAQ Management		Save FAQ		Changes in FAQ must be saved
POS-CON-27	FAQ Management	Publish FAQ		System Admin	FAQ must be able to publish or not
<b>Guidelines</b>					
POS-CON-28	Guidelines Management	Search Guideline		System Admin	Title of the Guidelines must be searchable
POS-CON-29	Guidelines Management	View Guidelines		System Admin	User must be able to view Guidelines, and Guideline History
POS-CON-30-00	Guidelines Management	Create New Policy		System Admin	User must be able to create new policy
POS-CON-30-01	Guidelines Management		Input Details	System Admin	Details of Policy must be filled up includes URL and Title
POS-CON-30-02	Guidelines Management		Upload Files	System Admin	Policy must be uploaded and must be one upload per language



## Curriculum Catalogue

ID	Module	Title	User	Description
<b>Home</b>				
<b>Curriculum List</b>				
CC-HCU-01	Home - Curriculum	Search Curriculum		Search Curriculum through any keywords
CC-HCU-02	Home - Curriculum	Clear Filter		Any search keywords and filter must be cleared
CC-HCU-03	Home - Curriculum	School Year Filter		User must be able to select school year and the list of curriculum must be updated
CC-HCU-04	Home - Curriculum	Code Filter		Curriculum must be found by typing the curriculum code
CC-HCU-05	Home - Curriculum	Name Filter		Curriculum must be found by typing curriculum name
CC-HCU-06-00	Home - Curriculum	Availability Date		Curriculum must be found by Available date
CC-HCU-06-01	Home - Curriculum	Start Date		User must be able to select the start date of a curriculum
CC-HCU-06-02	Home - Curriculum	End Date		User must be able to select the a date of a curriculum
CC-HCU-07	Home - Curriculum	Status		Curriculum must be found by its status
CC-HCU-08	Home - Curriculum	Download Curriculum based on school year		User must be able to download the curriculum based on the school year
CC-HCU-09-00	Home - Curriculum	View List of Curriculum		Curriculum list must be displayed
CC-HCU-09-01	Home - Curriculum	Update Curriculum Details		User must be able to select update to edit details of curriculum
CC-HCU-09-02	Home - Curriculum	Arrangement of List		User must be able to rearrange the list based on Name, date, Status
CC-HCU-09-03	Home - Curriculum	View Curriculum Details		User must be able to select Curriculum Code in the table to view the details
CC-HCU-10-00	Home - Curriculum	Select Update Curriculum Details		User must be able to select an icon to edit curriculum details
CC-HCU-10-01	Home - Curriculum	Editable Curriculum Form		Curriculum Form must be editable and let the user input details
CC-HCU-10-02	Home - Curriculum	View Editable Curriculum Infos		User must be able to view details that edited before saving info
CC-HCU-10-03	Home - Curriculum	Save Update Details		User must be able to save edited curriculum infos
CC-HCU-11-00	Home - Curriculum	Add Curriculum		User must be able to add curriculum
CC-HCU-11-01	Home - Curriculum	Input Curriculum Details		User must be able to input curriculum details
CC-HCU-11-02	Home - Curriculum	Select Availability Start Date		User must be able to select availability date of the curriculum
CC-HCU-11-03	Home - Curriculum	Updated Status		User must be able to update the status of the curriculum
CC-HCU-11-04	Home - Curriculum	View Curriculum Summary		User must be able to view inputted details for curriculum
CC-HCU-11-05	Home - Curriculum	Save Curriculum Details		User must finally save the inputted curriculum details
<b>Course</b>				
CC-HCO-01	Home - Course	Search Course		Search Course through any keywords
CC-HCO-02	Home - Course	Clear Filter		Any search keywords and filter must be cleared
CC-HCO-03	Home - Course	School Year Filter		User must be able to select school year and the list of course must be updated
CC-HCO-04	Home - Course	Code Filter		Course must be found by typing the course code
CC-HCO-05	Home - Course	Name Filter		Course must be found by typing course name
CC-HCO-06	Home - Course	Curriculum Filter		Course must be found by typing curriculum
CC-HCO-07	Home - Course	Subject Filter		Course must be found by typing course subject
CC-HCO-08	Home - Course	Section Name Filter		Course must be found by typing course section name
CC-HCO-09	Home - Course	Status Filter		Course must be found by typing course Status
CC-HCO-10	Home - Course	Keywords Filter		Course must be found by typing keywords
CC-HCO-11	Home - Course	Download Course based on school year		User must be able to download the course based on the school year
CC-HCO-12-00	Home - Course	View List of Course		User must be able to view list of courses
CC-HCO-12-01	Home - Course	Update Course Details		User must be able to select an icon to edit course details
CC-HCO-12-02	Home - Course	Arrangement of List		User must be able to rearrange the list based on Name, date, Status
CC-HCO-12-03	Home - Course	View Course Details		User must be able to select course code and view course details
CC-HCO-12-04	Home - Course	Checkbox for Ordering		User must be able to tick check boxes
CC-HCO-13-00	Home - Course	Select Update Course Details		
CC-HCO-13-01	Home - Course	Editable Course Form		User must be able to input course details
CC-HCO-13-02	Home - Course	Edit Curriculum Name (Code)		System must be able to display the list of curriculum in order for the user to select it
CC-HCO-13-03	Home - Course	Include HQT (Email)		System must be able to validate if the input email already exist
CC-HCO-13-04	Home - Course	Placing Maximum Capacity of Course		User must be able to input numerical number to set class maximum
CC-HCO-13-05	Home - Course	Select multiple grade level		User must be able to select which grade school will the course be offered
CC-HCO-13-06	Home - Course	Save Update Details		User must be able to save updated details
CC-HCO-14-00	Home - Course	Add Course		User must be able to select Add Course button
CC-HCO-14-01	Home - Course	Input Curriculum Name		System must be able to display the list of curriculum in order for the user to select it
CC-HCO-14-02	Home - Course	Select Course Subject		User must be able to select type of course subject
CC-HCO-14-03	Home - Course	Include HQT (Email)		System must be able to validate if the input email already exist
CC-HCO-14-04	Home - Course	Placing Maximum Capacity of Course		User must be able to input numerical number to set class maximum
CC-HCO-14-05	Home - Course	Select multiple grade level		User must be able to select which grade school will the course be offered
CC-HCO-14-06	Home - Course	View Course Summary		User must be able to view the details inputted for the course
CC-HCO-14-07	Home - Course	Save Update Details		User must be able to save the details
<b>Order</b>				
CC-HO-01-00	Home - Order	View List of Orders	Admin, Tech Processor, Teacher, Guardian,	User must be able to view the list of orders
CC-HO-01-01	Home - Order	Pagination	System Admin	User must be able to view and select Page Number
CC-HO-01-02	Home - Order	View and Add Notes		User must be able to add and view notes
CC-HO-01-03	Home - Order	Arrangement of List		User must be able to rearrange the list based on Name, date, Status
CC-HO-02-00	Home - Order	Search Box		User must be able to search Order
CC-HO-02-01	Home - Order	School Year Filter		User must be able to select school year and the list of course must be updated
CC-HO-02-02	Home - Order	CC Order ID Filter		Order must be found by typing CC Order ID
CC-HO-02-03	Home - Order	Student Name		Order must be found by typing Student Name
CC-HO-02-04	Home - Order	District ID		Order must be found by typing District ID
CC-HO-02-05	Home - Order	Date Submitted		Order must be found by selecting date submitted
CC-HO-02-06	Home - Order	Status		Order must be found by selecting status
CC-HO-02-07	Home - Order	POS Order ID		Order must be found by typing POS Order ID
CC-HO-02-08	Home - Order	Course Section		Order must be found by typing section
CC-HO-02-09	Home - Order	Course Subject		Order must be found by course subject
CC-HO-03-00	Home - Order	Download Order		User must be able to download Orders based on filters below
CC-HO-03-01	Home - Order	School Year Filter		User must be able to select school year filter for downloading
CC-HO-03-02	Home - Order	Processed		User must be able to select Processed Filter filter for downloading Processed Orders
CC-HO-03-03	Home - Order	Waitlisted		User must be able to select Waitlisted filter for downloading Waitlisted Orders
CC-HO-03-04	Home - Order	WD Requested		User must be able to select WD Requested filter for downloading WD Requested orders
CC-HO-03-05	Home - Order	Verified WD Request		User must be able to select Verified WD Request filter for downloading Verified WD Request Filter
CC-HO-04	Home - Order	View Card for every Order Statuses	System Admin	User must be able to view the card of every Order Statuses
CC-HO-05-00	Home - Order	Select Card		User must be able to view Status Cards

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CC-HO-05-01	Home - Order		View List of Orders		User must be able to view the list of orders based on status selected
CC-HO-05-02	Home - Order		Select Course ID		User must be able to view the Order Details
CC-HO-05-03	Home - Order		Select Functional Buttons depend on the status		User must be able to view and select buttons for a specific order. These buttons will defer depends on the status of the order
CC-HO-05-04	Home - Order		CC Order ID can be copied		CC Order ID can be copied from student details
CC-HO-05-05	Home - Order		Editable Shipping Details		Shipping details is editable either manually input new details or select saved address
CC-HO-05-06	Home - Order		Search Transaction History		User must be able to input any keyword in Transaction tab to search transaction history
CC-HO-06-00	Home - Order	View and Select	Create Order Button	System Admin	User must be able to view and Select "Create Order" Button
CC-HO-06-01	Home - Order		Navigation Buttons		These are the buttons that will let the user move forward or move backward during order processing
CC-HO-06-02	Order - Curriculum Selection		Search Curriculum		User must be able to search curriculum
CC-HO-06-03	Order - Curriculum Selection		View Curriculum list	System Admin	User must be able to view the list of students and select a student for creating an order
CC-HO-06-04	Order - Curriculum Selection		SY Filter		User must be able to select SY filter to change the list
CC-HO-06-05	Order - Curriculum Selection		Filter Criteria		User must be able to select different criteria in searching
CC-HO-06-06	Order - Curriculum Selection		Curriculum Code		User must be able to input curriculum code for searching
CC-HO-06-07	Order - Curriculum Selection		Curriculum Name		User must be able to input curriculum name for searching
CC-HO-06-08	Order - Curriculum Selection		Curriculum Description		User must be able to input curriculum description for searching
CC-HO-06-09	Order - Curriculum Selection		Clear Filter		User must be able to clear filter to remove any filters including characters in searchbox
CC-HO-06-10	Order - Curriculum Selection		Pagination		Option to change the number of curriculum in the list
CC-HO-06-11	Order - Curriculum Selection		Selecting Curriculum		A radio type button to choose curriculum
CC-HO-06-12	Order - Course & Resources		View Course List		User must be able to view course list
CC-HO-06-13	Order - Course & Resources		Multiple select of Course/s		User must be able to select multiple course/s
CC-HO-06-14	Order - Course & Resources		Filter Criteria		User must be able to select different criteria in searching
CC-HO-06-15	Order - Course & Resources		Subject		User must be able to choose and select available Subjects
CC-HO-06-16	Order - Course & Resources		From Grade Level		User must be able to select From what Grade Level the course they are looking for
CC-HO-06-17	Order - Course & Resources		To Grade Level		User must be able to select To what Grade Level the course they are looking for
CC-HO-06-18	Order - Course & Resources		Clear Filter		User must be able to clear filter to remove any filters including characters in searchbox
CC-HO-06-19	Order - Course & Resources		Pagination		Option to change the number of curriculum in the list
CC-HO-06-20	Order - Course & Resources		Order Request Info - Shipping Details	System Admin	User must be able to view Shipping Details
CC-HO-06-21	Order - Course & Resources		Order Request Info - Order Summary	System Admin	User must be able to view the summary of order/s
CC-HO-06-22	Order - Student Selection		View Student List		User must be able to view list of students
CC-HO-06-23	Order - Student Selection		Multiple select of Student/s		User must be able to select multiple students
CC-HO-06-24	Order - Student Selection		Filter Criteria		User must be able to select different criteria in searching
CC-HO-06-25	Order - Student Selection		Name		User must be able to input Name for searching
CC-HO-06-26	Order - Student Selection		ID		User must be able to input Student ID for searching
CC-HO-06-27	Order - Student Selection		Pagination		User must be able to change the number of students listed in the system
CC-HO-06-28	Order - Student Selection		View Student Details		System must be able to display Student details
CC-HO-06-29	Order - Student Selection		Select Shipping Address		User must be able to select shipping address which is already saved in the system
CC-HO-06-30	Order - Student Selection		Add New Shipping Details		User must be able to input manually the shipping details
CC-HO-06-31	Order - Summary		View Student Details		User must be able to view the list of students
CC-HO-06-32	Order - Summary		View Courses		User must be able to view the course/s ordered
CC-HO-06-33	Order - Summary		Remove Courses		User must be able to remove order course/s ordered
CC-HO-06-34	Order - Summary		Edit Shipping Details		Shipping Details must be able to change
CC-HO-06-35	Home - Order		Saved Details		Order Details must be saved
CC-HO-06-36	Home - Order		Update in Current Balance		System must be able to update the Current Balance once the ordering finished
CC-HO-06-37	Home - Order		Update in POS		System must be able to reflect the order in POS and changes in the balance
CC-HO-06-38	Home - Order		View full order details		System must display the full order details upon finishing ordering
<b>Task</b>					
CC-HT-01-00	Home - Task	View List of Orders		Admin, Tech Processor, Teacher, Guardian,	User must be able to view the list of orders
CC-HT-01-01	Home - Task	Pagination		System Admin	User must be able to view and select Page Number
CC-HT-01-02	Home - Task	Arrangement of List			User must be able to rearrange the list based on Name, date, Status
CC-HT-02	Home - Task	Search Box			User must be able to input keywords in the search box
CC-HT-03	Home - Task	Clear Filter			User must be able to clear filter to remove any filters including characters in searchbox
CC-HT-04	Home - Task	View Card for every Order Statuses		System Admin	User must be able to view the card of every Order Statuses
CC-HT-05-00	Home - Task	Select Card			User must be able to select the status card
CC-HT-05-01	Home - Task	View List of Orders			User must be able to view the list of orders based on status selected
CC-HT-06-00	Home - Task	Select Order Details			User must be able to select order in order list
CC-HT-06-01	Home - Task	View Order Details			User must be able to view order details
CC-HT-06-02	Home - Task	Add Order Notes			User must be able to add and view notes
CC-HT-06-03	Home - Task	CC Order ID can be copied			CC Order ID can be copied from student details
CC-HT-06-04	Home - Task	Editable Shipping Details			Shipping details is editable either manually input new details or select saved address
CC-HT-06-05	Home - Task	Search Transaction History			User must be able to search transactions in transaction history tab
CC-HT-07	Home - Task	Update Order Details			User must be able to update order details
<b>Pending Orders</b>					
CC-HT-08-01	Task - Pending Order	View Pending Orders List			User must be able to view Pending Orders
CC-HT-08-0201	Task - Pending Order	Select Checkbox of Order			User must be able to do multiple selection of orders
CC-HT-08-0202	Task - Pending Order	Change Course			User must be able to select the Change Course button and a modal must appear that contains the following:
CC-HT-08-0203	Task - Pending Order	List of Courses			System must be able to view the list of courses
CC-HT-08-0204	Task - Pending Order	Search Course			User must be able to search courses
CC-HT-08-0205	Task - Pending Order	School Year Filter			User must be able to select school year filter
CC-HT-08-0206	Task - Pending Order	Course Name Filter			User must be able to select course name filter for searching course
CC-HT-08-0207	Task - Pending Order	Subject Filter			User must be able to select subject filter for searching course
CC-HT-08-0208	Task - Pending Order	From Grade Level Filter			User must be able to select From Grade Level filter for searching course
CC-HT-08-0209	Task - Pending Order	To Grade Level Filter			User must be able to select To Grade Level filter for searching course

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CC-HT-08-0210	Task - Pending Order		Clear filter	User must be able to clear filter to remove any filters including characters in searchbox
CC-HT-08-0211	Task - Pending Order		Select New Course	User must be able to finalize the course selected
CC-HT-08-0212	Task - Pending Order		Assign to Self	User must be able to assign to self the order/s
CC-HT-08-0301	Task - Pending Order	Select Order Details		Select and View Full Order Details
CC-HT-08-0302	Task - Pending Order		Change Course	User must be able to select the Change Course button and a modal must appear that was mentioned
CC-HT-08-0303	Task - Pending Order		Assign to Self	User must be able to finalize the course selected
CC-HT-08-0304	Task - Pending Order		Cancel	User must be able to cancel the order
<b>Waitlisted</b>				
CC-HT-09-01	Task - Waitlisted	View Waitlisted Order List		User must be able to view Waitlisted Orders
CC-HT-09-0201	Task - Waitlisted	Select Checkbox of Order		User must be able to do multiple selection of orders
CC-HT-09-0202	Task - Waitlisted		Change Course	User must be able to select the Change Course button and a modal must appear that contains the following:
CC-HT-09-0203	Task - Waitlisted		List of Courses	System must be able to view the list of courses
CC-HT-09-0204	Task - Waitlisted		Search Course	User must be able to search courses
CC-HT-09-0205	Task - Waitlisted		School Year Filter	User must be able to select school year filter
CC-HT-09-0206	Task - Waitlisted		Course Name Filter	User must be able to select course name filter for searching course
CC-HT-09-0207	Task - Waitlisted		Subject Filter	User must be able to select subject filter for searching course
CC-HT-09-0208	Task - Waitlisted		From Grade Level Filter	User must be able to select From Grade Level filter for searching course
CC-HT-09-0209	Task - Waitlisted		To Grade Level Filter	User must be able to select To Grade Level filter for searching course
CC-HT-09-0210	Task - Waitlisted		Clear filter	User must be able to clear filter to remove any filters including characters in searchbox
CC-HT-09-0211	Task - Waitlisted		Select New Course	User must be able to finalize the course selected
CC-HT-09-0212	Task - Waitlisted		Cancel	User must be able to cancel the order
CC-HT-09-0213	Task - Waitlisted		Approve Waitlisted Item	Select and View Full Order Details (Button)
CC-HT-09-0301	Task - Waitlisted	Select Order Details		User must be able to select order in order list to access order details
CC-HT-09-0302	Task - Waitlisted		Change Course	User must be able to select the Change Course button and a modal must appear that was mentioned
CC-HT-09-0303	Task - Waitlisted		Approve Waitlist	Select and View Full Order Details (Button)
	Task - Waitlisted		Cancel	User must be able to cancel the order
CC-HT-09-0304	Task - Waitlisted	Waitlist Email		System must be able to send email to the HST
<b>Processing</b>				
CC-HT-10-01	Task - Processing	View Processing Order List		User must be able to view Processing Orders
CC-HT-10-0200	Task - Processing	Select Checkbox of Order		User must be able to do multiple selection of orders
CC-HT-10-0201	Task - Processing		Change Course	User must be able to select the Change Course button and a modal must appear that contains the following:
CC-HT-10-0202	Task - Processing		List of Courses	System must be able to view the list of courses
CC-HT-10-0203	Task - Processing		Search Course	User must be able to search courses
CC-HT-10-0204	Task - Processing		School Year Filter	User must be able to select school year filter
CC-HT-10-0205	Task - Processing		Course Name Filter	User must be able to select course name filter for searching course
CC-HT-10-0206	Task - Processing		Subject Filter	User must be able to select subject filter for searching course
CC-HT-10-0207	Task - Processing		From Grade Level Filter	User must be able to select From Grade Level filter for searching course
CC-HT-10-0208	Task - Processing		To Grade Level Filter	User must be able to select To Grade Level filter for searching course
CC-HT-10-0209	Task - Processing		Clear filter	User must be able to clear filter to remove any filters including characters in searchbox
CC-HT-10-0210	Task - Processing		Select New Course	User must be able to finalize the course selected
CC-HT-10-0211	Task - Processing		Process	User must be able to select Process button to process the order
CC-HT-10-0300	Task - Processing	Select Order Details		User must be able to select order in order list to access order details
CC-HT-10-0301	Task - Processing		Change Course	User must be able to select the Change Course button and a modal must appear that was mentioned
CC-HT-10-0302	Task - Processing		Process	User must be able to select Process button to process the order
CC-HT-10-0303	Task - Processing		Cancel	User must be able to cancel the order
CC-HT-10-0304	Task - Processing		Adjust	User must be able to adjust the course fee
CC-HT-10-0305	Task - Processing		Unassign	User must be able to unassign the order in Transaction Tab of Order details
CC-HT-10-0306	Task - Processing		Add Order Notes	User must be able to add and view notes
<b>Processed</b>				
CC-HT-11-01	Task - Processed	View Processed Order List		User must be able to view Processed Orders
CC-HT-11-0200	Task - Processed	Select Order Details		Select and View Full Order Details
CC-HT-11-0201	Task - Processed		Change Course	User must be able to select the Change Course button and a modal must appear that was mentioned
CC-HT-11-0202	Task - Processed		Request to Withdraw	User must be able to select request to withdraw and the system shall update the status of the order
CC-HT-11-0203	Task - Processed		Cancel	User must be able to cancel the order
CC-HT-11-0204	Task - Processed		Adjust	User must be able to adjust the course fee
CC-HT-11-0205	Task - Processed		Add order notes	User must be able to add and view notes
<b>SV Approval</b>				
CC-HT-12-01	Task - SV Approval	View SV Approval Order List		User must be able to view SV Approval Orders
CC-HT-12-0300	Task - SV Approval	Select Order Details		Select and View Full Order Details
CC-HT-12-0304	Task - SV Approval		Select SV Approval	User must be able to Approve the Order for SV Approval
CC-HT-12-0305	Task - SV Approval		Add order notes	User must be able to add and view notes
<b>WD Request</b>				
CC-HT-13-01	Task - WD Request	View WD Request Order List		User must be able to view WD Request Orders
CC-HT-13-0200	Task - WD Request	Select Checkbox of Order		User must be able to do multiple selection of orders
CC-HT-13-0201	Task - WD Request		Assign WD Request to Self	User must be able to select a button that will let the order must assign to self
CC-HT-13-0202	Task - WD Request		Assign WD Request to Others	User must be able to select a button for this that will assign the orders to other processor
CC-HT-13-0203	Task - WD Request		Select Processor	User must be able to select processor
CC-HT-13-0204	Task - WD Request		Unassign WD Request	User must be able to unassign to self the request and update the status
CC-HT-13-0300	Task - WD Request	Select Order Details		Select and View Full Order Details
CC-HT-13-0301	Task - WD Request		Undo Request to Withdraw	User must be able to unassign to self the request and update the status
CC-HT-13-0302	Task - WD Request		Assign WD Request to Self	User must be able to select a button that will let the order must assign to self
CC-HT-13-0303	Task - WD Request		Assign WD to Others	User must be able to select a button for this that will assign the orders to other processor
CC-HT-13-0304	Task - WD Request		Select Processor	User must be able to select processor
CC-HT-13-0305	Task - WD Request		Verify WD Request	User must be able to select a button for this that will change the status of the order
CC-HT-13-0306	Task - WD Request		Unassign WD Request	User must be able to unassign to self the request and update the status
CC-HT-13-0307	Task - WD Request		Add order notes	User must be able to add and view notes
<b>Verified WD Request</b>				
CC-HT-14-01	Task - Verified WD Request	View Verified WD Request Order List		User must be able to view Verified WD Request Orders
CC-HT-14-0200	Task - Verified WD Request	Select Checkbox of Order		User must be able to do multiple selection of orders

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CC-HT-14-0201	Task - Verified WD Request		Assign Verified WD Request to Self	User must be able to select a button for this that will assign the order for himself
CC-HT-14-0202	Task - Verified WD Request		Assign Verified WD Request to Others	User must be able to select a button for this that will assign the orders to other processor
CC-HT-14-0203	Task - Verified WD Request		Select Processor	User must be able to select processor
CC-HT-14-0204	Task - Verified WD Request		Unassign Verified WD Request	User must be able to unassign to self the request and update the status
CC-HT-14-0300	Task - Verified WD Request	Select Order Details		Select and View Full Order Details
CC-HT-14-0301	Task - Verified WD Request		Assign Verified WD Request to Self	- User must be able to select a button that will let the order must assign to self -User must be able to select a button for this and the system must display another functions
CC-HT-14-0302	Task - Verified WD Request		Refund	System must be able to update the balance of the student
CC-HT-14-0303	Task - Verified WD Request		No Refund	There will be no changes in the balance of the student
CC-HT-14-0304	Task - Verified WD Request		Assign Verified WD to Others	User must be able to select a button for this that will assign the orders to other processor
CC-HT-14-0305	Task - Verified WD Request		Select Processor	User must be able to select processor
CC-HT-14-0306	Task - Verified WD Request		Unassign Verified WD Request	User must be able to unassign to self the request and update the status
CC-HT-14-0307	Task - Verified WD Request		Add order notes	User must be able to add and view notes
<b>Finalized WD Requested</b>				
CC-HT-15-01	Task - Finalized WD Requested	View Finalized WD Request Order List		User must be able to view Finalized WD Request Orders
CC-HT-15-0200	Task - Finalized WD Requested	Select Order Details		Select and View Full Order Details
CC-HT-15-0201	Task - Finalized WD Requested		Adjust	User must be able to adjust the price
CC-HT-15-0202	Task - Finalized WD Requested		Add order notes	User must be able to add and view notes
<b>Invoiced</b>				
CC-HT-16-01	Task - Invoiced	View Invoiced Order Request	System Admin	User must be able to view Invoiced Orders in order list by selecting Canceled Card
CC-HT-16-02	Task - Invoiced	View Invoiced Order Request in the Order Details	System Admin	User must be able to view order details
<b>Canceled</b>				
CC-HT-17-01	Task - Canceled	View Canceled Order Request	System Admin	User must be able to view Canceled Orders in order list by selecting Canceled Card
CC-HT-17-02	Task - Canceled	View Canceled Order Request in the Order Details	System Admin	User must be able to view order details
<b>Student</b>				
CC-ST-01	Home - Student	View list of students		System must be able to display the list of the students
CC-ST-02	Home - Student	Search by Filter		User must be able to search student and has an option to use filters
CC-ST-03	Home - Student	Search Box		User must be able to input keywords in search box to search Student
CC-ST-04	Home - Student	School Year Filter		User must be able to select school year filter
CC-ST-05-00	Home - Student	View Student Details		User must be able to view student details by selecting student name in student list
CC-ST-05-01	Home - Student		School Year Filter	School year filter to change the list of Orders based on school year selected
CC-ST-05-02	Home - Student		Pagination	User must be able to change the number of courses in the list to view other transactions
<b>Video</b>				
CC-VID-01-00	Home - Video	View the list of Videos		User must be able to view the list of videos
CC-VID-01-01	Home - Video		Toggle Status of Videos	User must be able to enable/disable the status of the video
CC-VID-01-02	Home - Video		Edit Video Details	User must be able to edit video details
CC-VID-02	Home - Video	Filter the Status		User must be able to filter its list of videos by status
CC-VID-03	Home - Video	Add New Video		User must be able to add new video
CC-VID-04	Home - Video	View Video		User must be able to select the title of video and will redirect the user to another page to view the video
<b>Upload</b>				
<b>Curriculum</b>				
CC-UCU-01	Upload - Curriculum	Download Template		User must be able to download CSV file as a guide in uploading file
CC-UCU-02	Upload - Curriculum	Upload File		CSV must be uploaded for uploading curriculum
CC-UCU-03	Upload - Curriculum	Status Description		The status of uploading must be displayed by the system
<b>Course</b>				
CC-UCO-01	Upload - Course	Download Template		User must be able to download CSV file as a guide in uploading file
CC-UCO-02	Upload - Course	Upload File		CSV must be uploaded for uploading course
CC-UCO-03	Upload - Course	Status Description		The status of uploading must be displayed by the system
<b>Curriculum Rollover</b>				
CC-UCR-01	Upload - Curriculum Rollover	Download Template		User must be able to download CSV file as a guide in uploading file
CC-UCR-02	Upload - Curriculum Rollover	Upload File		CSV must be uploaded for uploading curriculum rollover
CC-UCR-03	Upload - Curriculum Rollover	Status Description		The status of uploading must be displayed by the system
<b>HQT</b>				
CC-HQT-01	HQT	Search HQT		User must be able to search HQT
CC-HQT-02	HQT	Clear Filter		User must be able to clear filter including keywords in search bar
CC-HQT-03-00	HQT	View List of HQT		User must be able to view the list of HQT
CC-HQT-03-01	HQT		Update hqt Details	User must be able to update HQT details
CC-HQT-03-02	HQT		Toggle status	User must be able to change the status of HQT
CC-HQT-04-00	HQT	Select Update HQT Details		System must be able to redirect the user to another page to update HQT details
CC-HQT-04-01	HQT		Editable HQT Details	User must be able to input HQT details
CC-HQT-04-02	HQT		Email must not be reuse	System must be able to validate if the email was already saved in the system
CC-HQT-04-03	HQT		HQT Summary	User must be able to view the details inputted in the system
CC-HQT-04-04	HQT		Save Update Details	User must be able to save the details inputted
CC-HQT-05-00	HQT	Add HQT		User must be able to select Add HQT button
CC-HQT-05-01	HQT		Editable HQT Details	User must be able to input details for HQT
CC-HQT-05-02	HQT		Email must not be reuse	System must be able to validate if the email was already saved in the system
CC-HQT-05-03	HQT		HQT Summary	User must be able to view the details inputted in the system
CC-HQT-05-04	HQT		Save Update Details	User must be able to save the details inputted
<b>Report</b>				
CC-R-01	Report	Report Type		User must be able to select in dropdown options or Report Type
CC-R-02-00	Report	Per Curriculum Report		User must be able to select Per Curriculum Report
CC-R-02-01	Report		Curriculum Name (Code)	System must be able to let the user view Curriculum Name by showing the list
CC-R-02-02	Report	Report Request		User must be able to input what type of Report Request
CC-R-02-03	Report	Requested Date		User must be able to input requested date
CC-R-02-04	Report	Course Remarks		User must be able to leave remarks before downloading
CC-R-03-00	Report	Productivity Report		User must be able to select Productivity Report

CC-R-03-01	Report		Report Request	User must be able to input what type of Report Request
CC-R-03-02	Report		Report Selection Type	Reports that will be pulled out either from all employee or selected employee/s
CC-R-03-03	Report		Search Processor	User must be able to search processor
CC-R-03-04	Report		List of Processor	System must be able to display list of processor
CC-R-03-05	Report		Select Processor/s	User must be able to select Processor/s from the list
CC-R-04	Report	Download Report		User must be able to download report

## Other Features of POC and CC

ID	Module	Title		User	Description	
Single Sign-on Credentials						
POS-SSC-01-00	Single Sign-on Credentials	User Accessing System			System must be able to validate if the email used is registered for guardian or employees	
					System allows users to enter email and password, and has a login button that allows users to provide their credentials for their account.	
			Login			System must display the specific error message for incorrect logins.  System unmask password when this checkbox is selected.
			Forgot password			System will require user to input an email and a reset link will be sent to them if they have an account with the site
POS-SSC-01-01			Guardian Accessing the System			System must be able to open the POS only
POS-SSC-01-02			Employees Accessing the staff [11]			User must be able to view two options in accessing the system either POS or CC
POS-SSC-02			Landing Page			User must have the option to switch between POS & CC without exiting the system
Content Management - it let's the user configure announcement details in the system and the layout of the system						
	Announcement Banner					
POS-CM-01-0100	Content Management - Announcement Banner	Create Banner			User must be able to select the Create Banner Button	
POS-CM-01-0101			Customizable Content		Content must be customizable from font size, color and style	
POS-CM-01-0102			Placement of Banner		User must be able to select which part of the system must placed the banner	
POS-CM-01-0103			Date and Time of Posting		User must be able to choose date and time of posting and when will the posting ends	
POS-CM-01-0200		Banner Posting History			User must be able to view the list of postings	
POS-CM-01-0201			Banner Posting History Details		User must be able to select a posting log	
POS-CM-01-0202			Post Again Function		It let the user repost the post	
POS-CM-01-0203		Edit and Post Button			User must be able to reuse the post and edit the content	
	Logo					
POS-CM-02-0100	Content Management - Logo	Upload Logo			User must be able to Upload Logo	
POS-CM-02-0101			Logo Details		User must be able to input logo details	
POS-CM-02-0102			Saved details and logo		User must be able to save the details and logo	
			Upload Logo for Report		A separate upload of logo that will be put in the report	
			Select Report Type		User must be able to select which reports which must change its logo in the file	
POS-CM-02-0200		System Updates			System must be able to integrate the logo in the system already it includes the landing page, and reports that has logo	
POS-CM-02-0300		Logo Upload History			User must be able to view past logs in uploading the logo	
POS-CM-02-0301			Download the uploaded logo		User must be able to download the uploaded logo	
POS-CM-02-0302			View Logo Details		User must be able to view logo details	
POS-CM-02-0303			Search uploaded logo		User must be able to search the uploaded logo	
POS-CM-02-04		View Output Sample			System must be able to display samples of changes in the system	
		Layout				
Reports Builder - it lets the user have customizable reports						
POS-RB-01	Reports Builder	View List of reports			User must be able to view list of reports	
POS-RB-02			Select Report Type		User must be able to select the report in the list of reports	
POS-RB-03			Search Report Type		User must be able to search report	
POS-RB-04		View Elements Available in the Report			User must be able to view the names of the columns in a report in the selected report	
POS-RB-05		Unselect the Element			User must be able to unselect the column/s that the user does not want to see in the reports	
POS-RB-06		Saved Changes			User must be able to save the changes in the report	

## Additional Features

ID	Module	Title	User	Description
<b>POS</b>				
<b>Log In</b>				
LG - 00	Log In	View Media Release	Parent	User must be able to view the Media Release Form
LG - 01	Log In	Auto-populate the form	Parent	System must be able to display the name of the parents and students in the form
LG - 02	Log In	Sign the Form	Parent	User must be able to sign the form using trackpad or mouse
LG - 03	Log In	View Handbook	Parent	User must be able to view the Handbook Forms
LG - 04	Log In	Auto-populate the form	Parent	System must be able to display the name of the parents and students in the form
LG - 05	Log In	Sign the Form	Parent	User must be able to sign the form using trackpad or mouse
<b>Student</b>				
ST - 00	Student	Download Inventory (Filtered)	System Admin	User must be able to download inventory based on the following filter: a. Item Type b. Item Status c. Start Date d. End Date e. Product/ Non-Product Type Item
<b>Vendors Details List</b>				
<b>Details List of Services</b>				
VDL - 00 - 00	Vendor Details List	Edit and view the list of Pricing Items	System Admin	User must be able to view and edit the list of Pricing Items
VDL - 00 - 01	Vendor Details List	Download List of Pricing Items	System Admin	User must be able to download the list of Pricing Items
VDL - 00 - 02	Vendor Details List	Upload List of Pricing Items	System Admin	User must be able to Upload the list of Pricing Items
VDL - 00 - 03	Vendor Details List	Add New List of Pricing Items	System Admin	User must be able to add new list of Pricing Items
VDL - 00 - 04	Vendor Details List	Reload List of Pricing Items	System Admin	User must be able to reload list of Pricing Items
VDL - 01 - 00	Vendor Details List	Edit and view the list of Instructors	System Admin	User must be able to view and edit the list of instructors
VDL - 01 - 01	Vendor Details List	Download List of Instructors	System Admin	User must be able to download the list of instructors
VDL - 01 - 02	Vendor Details List	Upload List of Instructors	System Admin	User must be able to Upload the list of instructors
VDL - 01 - 03	Vendor Details List	Add New List of Instructors	System Admin	User must be able to add new list of instructors
VDL - 01 - 04	Vendor Details List	Reload List of Instructors	System Admin	User must be able to reload list of instructors
VDL - 02 - 00	Vendor Details List	Edit and view the list of locations	System Admin	User must be able to view and edit the list of locations
VDL - 02 - 01	Vendor Details List	Download List of locations	System Admin	User must be able to download list of locations
VDL - 02 - 02	Vendor Details List	Upload list of locations	System Admin	User must be able to Upload list of locations
VDL - 02 - 03	Vendor Details List	Add New list of locations	System Admin	User must be able to add a new list of locations
VDL - 02 - 04	Vendor Details List	Reload list of locations	System Admin	User must be able to reload list of locations
<b>CC</b>				
HC - 00	Home - Course	Add Subsequent Course	System Admin	User must be able add subsequent class to the class already in the system
HC - 01	Home - Course	Invalidating Subsequent Course	System Admin	System must be able to reject any course that will be linking to a class that was already linked to another class
HC - 02	Home - Course	Automatic Filling of Classes	System Admin	- System must be able to fill up first the class that is not yet full - Activating and deactivating class until it became full
HC - 03	Home - Course	Logs of Subsequent Course	System Admin	System must be able to display the transaction history of the class when it was added or removed from the main class

## EOA - Client-Facing

ID	Module	Title	User	Description
EOA-FE-00	Home	View Banner Announcement	Parent	User must be able to view the announcement in the Page
EOA-FE-03	Home	Email Subscriptions	Parent	<ul style="list-style-type: none"> <li>- User must be able to input email to be updated on what's new in the Field Trip List</li> <li>- System must be able to receive the email input by the user</li> <li>- System must be able to send updates on the email registered by the user</li> </ul>
<b>Field Trip</b>				
EOA-FT-01	Events	View Field Trip Events	Parent	<ul style="list-style-type: none"> <li>- User must be able to view events under Field Trip</li> <li>- System must be able to display the lists in different tabs</li> </ul>
EOA-FT-02	Events	Favorite the Event	Parent	<ul style="list-style-type: none"> <li>- User must be able to favorite the Field Trip event</li> <li>- User must be able to filter the events that has favorite marking</li> </ul>
EOA-FT-03	Events	Email Subscriptions	Parent	<ul style="list-style-type: none"> <li>- User must be able to input email to be updated on what's new in the Field Trip List</li> <li>- System must be able to send updates on the email registered by the user</li> </ul>
EOA-FT-04	Events	Search Event	Parent	User must be able to search any event
EOA-FT-05-00	Events	Book Events	Parent	<ul style="list-style-type: none"> <li>- System must be able to display the full details of the Field Trip Event</li> <li>- User must be able to book either Field Trip, Park Day, and Other Events</li> </ul>
EOA-FT-05-01	Events	Timer in Booking	Parent	<ul style="list-style-type: none"> <li>- System must be able to display a countdown of 5 minutes</li> <li>- System must be able to close the booking page if the user was unable to finished the booking</li> </ul>
EOA-FT-05-02	Events	Add Student / Chaperone, Guest	Parent	<ul style="list-style-type: none"> <li>- User must be able to add students that registered under him to book the event</li> <li>- System must be able to display different buttons for adding students, Chaperones, and Guest</li> </ul>
EOA-FT-05-03	Events	Choose Payment Method	Parent	<ul style="list-style-type: none"> <li>- User must be able to choose payment method either from Fund Bucket or Credit Card</li> </ul>
EOA-FT-05-04	Events	Choose Credit Card as payment	Parent	<ul style="list-style-type: none"> <li>- System must be able to proceed in payment using a stripe that will connect to the credit card</li> </ul>
EOA-FT-05-05	Events	View and Accepting Agreement Form	Parent	<ul style="list-style-type: none"> <li>- System must be able to display waiver form</li> <li>- User must be able to accept the waiver to proceed to the next step</li> </ul>
EOA-FT-05-06	Events	Confirm and Pay Booking	Parent	<ul style="list-style-type: none"> <li>- User must be able to view the summary of payment of booking</li> <li>- User must be able to confirm and pay the booking</li> </ul>
EOA-FT-05-07	Events	View Confirmation message	Parent	- User must be able to view order confirmation message
EOA-FT-05-08	Events	View Account	Parent	User must be able to view its own account that will redirect the user to the account page
<b>ACCOUNT</b>				
<b>Booking History</b>				
EOA-ABH-00-00	Account - Booking History	View Booking History	Parent	<ul style="list-style-type: none"> <li>- System must be able to display the table of booking history that has the following <ul style="list-style-type: none"> <li>a. Booking No</li> <li>b. Booking Date</li> <li>c. Event</li> <li>d. Attendees</li> </ul> </li> </ul>
EOA-ABH-00-01		Event Information	Parent	<ul style="list-style-type: none"> <li>- User must be able to select the Event Name in the table</li> <li>- System must be able to redirect the user to a new page to display event details</li> </ul>
<b>User Profile</b>				
EOA-AUP-00	Account - User Profile	View User Profile	Parent	User must be able to view the account's Name, Contact No, and Email
<b>Password Management</b>				
EOA-APM-00	Account - Password Management	Change Password	Parent	<ul style="list-style-type: none"> <li>- User must be able to change the password</li> <li>- System must be able to require the user to input old password</li> <li>- System shall not send any confirmation email to change password</li> </ul>
<b>Contact Us</b>				
EOA-ACU-00	Account - Password Management	View Contact Information	Parent	<ul style="list-style-type: none"> <li>- User must be able to view the Phone number, and email address</li> <li>- System shall not display any contact information that has links</li> <li>- System shall only display simple text</li> </ul>
<b>FAQ</b>				
EOA-FAQ-00	FAQ	View list of FAQ	Parent	User must be able to the list of FAQ
EOA-FAQ-01	FAQ	View Contact Infos	Parent	User must be able to view the list of contact infos of the School
<b>Non-Functional Requirements</b>				
EOA-NFR-00	Non-functional Requirements	Paying using Credit Card	Parent	<ul style="list-style-type: none"> <li>- System must be connected to a third party system to proceed in payment of credit card</li> <li>- System shall not save any card details</li> </ul>
EOA-NFR-01	Non-functional Requirements	Sending Email	Parent	System must be able to send emails to the user especially after confirming the payment of booking



## EOA - Admin

ID	Module	Title	User	Description
<b>Events</b>				
				<ul style="list-style-type: none"> <li>- User must be able to view the card of the Approved</li> <li>- System shall display the list of events, when a status is selected</li> <li>- System shall display the list of Approved Events</li> <li>- System shall display the events list in list form with the following details: <ul style="list-style-type: none"> <li>a. Event Name</li> <li>b. Instructor</li> <li>c. Venue</li> <li>d. Status</li> <li>e. Created Date &amp; By</li> </ul> </li> </ul>
EOA-ER-00	Event Request	View Event Requests (Approved)		<ul style="list-style-type: none"> <li>- User must be able to view the card of every Order Status (3 Status): <ul style="list-style-type: none"> <li>a. Published (Upcoming)</li> <li>b. Published Active</li> <li>c. Published Interest List</li> <li>d. Published Closed Events</li> </ul> </li> <li>- User must be able to view real time total number of events depends on its status</li> <li>- System shall display the list of events, when a status is selected (Table Format with the following info): <ul style="list-style-type: none"> <li>a. Name</li> <li>b. Location</li> <li>c. Schedule Dates</li> <li>d. Created</li> <li>e. Actions</li> </ul> </li> <li>- System shall provide the feature regardless of the status</li> <li>- User must be able to search the following: <ul style="list-style-type: none"> <li>a. Search Name</li> <li>b. SV Filter</li> </ul> </li> </ul>
EOA-ER-01	Event Request	View Event Requests (Published & For Processing)		<ul style="list-style-type: none"> <li>- System shall provide the feature whenever the card selected by the user</li> <li>- User must be able to input details</li> <li>- User must be able to search home names in the database to complete the details of the event</li> <li>- User must be able to select the mode of payment for the event is from a student fund or Credit Card</li> <li>- User must be able to upload and delete files</li> <li>- User must be able to input the quota of an event</li> <li>- System must be able to limit the capacity of the event once the ordering started</li> <li>- System must be able to display some of the details in the front end</li> <li>- The status of the newly added event is Approved</li> </ul>
EOA-ER-02	Event Request	Search Event		<ul style="list-style-type: none"> <li>- User shall search and the name of the facilitator</li> <li>- System shall retrieve data from the database</li> </ul>
EOA-ER-03-08	Event Request - Add Event	Add Event		<ul style="list-style-type: none"> <li>- System shall capture both date and time for schedule</li> <li>- User must be able to edit the event schedule</li> <li>- User must be able to delete schedule</li> </ul>
EOA-ER-03-01	Event Request - Add Event	Search Facilitator		<ul style="list-style-type: none"> <li>- System shall capture 3 kinds of Event Tickets (Student, Chaperson, Guests)</li> <li>- User shall be able to capture multiple event tickets</li> <li>- User shall be able to delete an event ticket</li> </ul>
EOA-ER-03-02	Event Request - Add Event	Manage Event Schedules		<ul style="list-style-type: none"> <li>- User shall be able to update of an attachment</li> <li>- System shall restrict the upload to 1 MB</li> <li>- User shall be able to download the attachment</li> <li>- User shall be able to create an attachment</li> </ul>
EOA-ER-03-03	Event Request - Add Event	Manage Event Tickets		<ul style="list-style-type: none"> <li>- User shall be able to upload of a photo</li> <li>- System shall restrict the upload to 1 MB</li> <li>- User shall be able to download the photo</li> <li>- User shall be able to delete a photo</li> </ul>
EOA-ER-03-04	Event Request - Add Event	Manage Attachments		<ul style="list-style-type: none"> <li>- User must be able to input a list of information about the event</li> <li>- System shall not provide any colors in editing form</li> </ul>
EOA-ER-03-05	Event Request - Add Event	Manage Photos		<ul style="list-style-type: none"> <li>- System shall display the status of each section of the event</li> <li>- System shall link to the tab corresponding to the section (Note: editing of the details will be done in the corresponding tab; NOT in the summary)</li> </ul>
EOA-ER-03-06	Event Request - Add Event	Manage Information		<ul style="list-style-type: none"> <li>- System shall allow viewing of event details regardless of status</li> <li>- System shall allow de of event details regardless of status</li> </ul>
EOA-ER-03-07	Event Request - Add Event	View Summary		<ul style="list-style-type: none"> <li>- System shall allow assignment of the event to either to self, or to other processors only for Approved Status</li> </ul>
EOA-ER-04	Event Request	View Event Details		<ul style="list-style-type: none"> <li>- User must be able to request the details</li> <li>- User must be able to submit for publishing after reviewing the details of the event</li> <li>- The status of the event will now be Published (Active, Closed, Upcoming, and Interest)</li> </ul>
EOA-ER-05	Event Request	Delete Event		<ul style="list-style-type: none"> <li>- User must be able to Cancel the order regardless of the status of the event</li> </ul>
EOA-ER-06	Event Request	Assign Event to Processor		<ul style="list-style-type: none"> <li>- User must be able to Unpublish the event in the Cancelled list of Events</li> <li>- System must be able to display the unpublish event in Approved list of Events</li> </ul>
EOA-ER-07	Event Request	Submit for Publishing		<ul style="list-style-type: none"> <li>- System shall display this feature in the action column of the Published Events</li> <li>- User must be able to replicate the Event to all Event has Published status</li> <li>- System must be able to add the replicated event in Approved List</li> </ul>
EOA-ER-08	Event Request	Cancel Event		<ul style="list-style-type: none"> <li>- User must be able to download Published event based on its status</li> </ul>
EOA-ER-09	Event Request	Unpublish Event		
EOA-ER-10	Event Request	Replicate Event		
EOA-ER-11	Event Request	Download Event Summary		
<b>Bookings</b>				
EOA-BOK-01	Bookings	Search Event		<ul style="list-style-type: none"> <li>- User must be able to search event and applies the school year filter</li> </ul>
EOA-BOK-02-00	Bookings	By Booking #		<ul style="list-style-type: none"> <li>- User must be able to search booking # in Overview, Attendee, and SV Approval</li> </ul>
EOA-BOK-02-01	Bookings	by Order #		<ul style="list-style-type: none"> <li>- User must be able to search Order # in Overview, Attendee, and SV Approval</li> </ul>
EOA-BOK-02-02	Bookings	by Registrant		<ul style="list-style-type: none"> <li>- User must be able to search Registrant in Overview</li> </ul>
<b>Overview</b>				
				<ul style="list-style-type: none"> <li>- System shall display the table lists of Overview bookings</li> <li>- System shall display the following details: <ul style="list-style-type: none"> <li>a. Event Title</li> <li>b. Schedule Date &amp; Time</li> <li>c. Tickets Count</li> <li>d. Attendee Status Count</li> </ul> </li> <li>- System shall display the current Ticket Count and Attendee Status Count in Overview Booking and attendee status count</li> </ul>
EOA-BOK-0-00	Bookings	View Booking List - Overview		<ul style="list-style-type: none"> <li>- User must be able to select the Event Name in the list</li> <li>- System must be able to display the following details: <ul style="list-style-type: none"> <li>a. Booking #</li> <li>b. Booking Date</li> <li>c. Registrant</li> <li>d. Email</li> <li>e. No. of Attendees</li> </ul> </li> <li>- User must be able to select the booking # in the table</li> </ul>
EOA-BOK-0-01-00	Bookings	View Booking Details - Overview		<ul style="list-style-type: none"> <li>- System shall display the following details: <ul style="list-style-type: none"> <li>a. Attendee</li> <li>b. HUB Order</li> <li>c. Tickets</li> <li>d. Fee</li> <li>e. Contact Person</li> <li>f. Status</li> <li>g. Booking Date</li> <li>h. Booking #</li> <li>i. Registrant</li> </ul> </li> </ul>
EOA-BOK-0-01-01	Bookings	View Booking Details through booking #		
<b>Attendees</b>				
				<ul style="list-style-type: none"> <li>- User must be able to select the Event Name in the list</li> <li>- System must be able to display the following details: <ul style="list-style-type: none"> <li>a. Name</li> <li>b. Booking #</li> <li>c. Booking Date</li> <li>d. Hub Order #</li> <li>e. Ticket</li> <li>f. Fee</li> <li>g. Mail</li> <li>h. Status</li> <li>i. Action Button - User must be able to Resend the order if the payment/transaction has failed</li> </ul> </li> <li>- User must be able to download the Audit Attendee Report in Attendees</li> <li>- User must be able to download the Attendee Report in Attendees</li> </ul>
EOA-BOK-A-01	Bookings	View Booking Details - Attendees		<ul style="list-style-type: none"> <li>- User must be able to search the attendee name</li> </ul>
EOA-BOK-A-02	Bookings	Download Audit Attendee Report		
EOA-BOK-A-03	Bookings	Download Attendee Report		
EOA-BOK-A-04	Bookings	Search Attendee Name		
<b>Interest List</b>				
				<ul style="list-style-type: none"> <li>- System shall display the table of Interest List</li> <li>- System shall display the following details: <ul style="list-style-type: none"> <li>a. Event Name</li> <li>b. Event Date</li> <li>c. Total Requests</li> <li>d. Total Requested Tickets</li> </ul> </li> <li>- System shall display the current Ticket Count and Attendee Status Count in Overview Booking and attendee status count</li> <li>- User must be able to select the Event Name in the list</li> <li>- System must be able to display the following details: <ul style="list-style-type: none"> <li>a. Request Date</li> <li>b. Name</li> <li>c. Contact</li> <li>d. Email</li> <li>e. Quantity</li> <li>f. Status</li> <li>g. Action</li> </ul> </li> <li>- System shall display the current Ticket Count and Attendee Status Count in Overview Booking and attendee status count *</li> </ul>
EOA-BOK-B-00	Bookings	View Bookings List - Interest List		<ul style="list-style-type: none"> <li>- User must be able to cancel the order in SV Approval in Action Column</li> </ul>
EOA-BOK-B-01-00	Bookings	View Booking Details - Interest List		<ul style="list-style-type: none"> <li>- User must be able to select the Event Name in the list</li> <li>- System must be able to resend the order to the client</li> <li>- System shall enable this feature if the transaction was failed</li> <li>- System shall send an email to remind the user</li> <li>- User must be able to search the attendee name</li> </ul>
EOA-BOK-B-01-01	Bookings	Download List		
EOA-BOK-B-02	Bookings	Download Summary Interest List		
<b>SV Approval List</b>				
				<ul style="list-style-type: none"> <li>- System shall display the table of Interest List</li> <li>- System shall display the following details: <ul style="list-style-type: none"> <li>a. Event Name</li> <li>b. Booking #</li> <li>c. Booking Date</li> <li>d. Hub Order #</li> <li>e. Ticket</li> <li>f. Fee</li> <li>g. Status</li> <li>h. Action</li> </ul> </li> <li>- System shall display the current Ticket Count and Attendee Status Count in Overview Booking and attendee status count *</li> </ul>
EOA-BOK-SV-00-00	Bookings	View Bookings List - SV Approval List		<ul style="list-style-type: none"> <li>- User must be able to cancel the order in SV Approval in Action Column</li> </ul>
EOA-BOK-SV-00-01	Bookings	Approve Order		
EOA-BOK-SV-00-02	Bookings	Cancel Order		
EOA-BOK-SV-02	Bookings	View Booking Details - Booking		
EOA-BOK-SV-03	Bookings	Resend Order		
EOA-BOK-SV-04	Bookings	Search Attendee Name		
<b>FAQs</b>				
				<ul style="list-style-type: none"> <li>- System must be able to display a table that contains the following: <ul style="list-style-type: none"> <li>a. Question</li> <li>b. Answer</li> <li>c. Edit Button</li> </ul> </li> </ul>
EOA-FAQ-00	FAQ	Display table of Type of events		

[CONFIDENTIAL]

Purchase Ordering System, Curriculum Catalogue and Events Ordering Application Development Project  
PIC-C-PCA-072023-001

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ID	Module	Title	User	Description
EOA-FAQ-01-00	FAQ	Edit FAQ		User must be able to edit FAQ details: - Description Box: a. Fixed Font style b. Options to make the font Header 1, 2, 3 c. Change the emphasis of the text (bold, underline, italics) d. Can be in Numbered form
EOA-FAQ-01-01		Upload Image		User must be able to add and delete image in an FAQ
EOA-FAQ-02	FAQ	Delete FAQ		User must be able to delete FAQ
EOA-FAQ-03	FAQ	Add FAQ		User must be able to add FAQ
EOA-FAQ-04	FAQ	Search Title		User must be able to search FAQ
<b>Subscribers</b>				
EOA-SUB-00	Subscribers	View Subscribers		System must be able display the list of subscribers including email
EOA-SUB-01	Subscribers	Edit Subscriber		User must be able to edit the details of subscriber
EOA-SUB-02	Subscribers	Delete Subscriber		User must be able to delete the Subscriber
EOA-SUB-03	Subscribers	Add Subscriber		- User must be able to email - System shall not send any confirmation email of adding the subscriber
<b>Inspirations</b>				
EOA-INS-00	Inspirations	View List of Inspirations		User must be able to view the list of inspirations
EOA-INS-01	Inspirations	Search Inspirations		User must be able to search inspiration
EOA-INS-02-00	Inspirations	Edit Inspiration		User must be able to edit details of inspiration
EOA-INS-02-01	Inspirations		Upload Image	User must be able to upload image
EOA-INS-03	Inspirations	Add Inspirations		User must be able to add inspiration
EOA-INS-04	Inspirations	Delete Inspiration		User must be able to delete inspiration
<b>Configurations</b>				
<b>Event Type</b>				
EOA-CON-ET-00	Configurations - Event Type	View Event Type		User must be able to view the table of Event Types
EOA-CON-ET-01	Configurations - Event Type	Add Event Type		User must be able to add Event Type that has details of Name & Description
EOA-CON-ET-02	Configurations - Event Type	Edit Details		User must be able to edit the any details of the Event Type
EOA-CON-ET-03	Configurations - Event Type	Delete Event Type		User must be able to delete the Event Type
<b>Venue</b>				
				User must be able to view the table of Venue of the following details: a. Venue Name b. Contact Person c. Contact Number d. Address e. City f. State g. Zip h. Website i. Email - System shall not send any confirmation email or in any contact numbers
EOA-CON-ET-00	Configurations - Venue	View Venue		
EOA-CON-ET-03	Configurations - Venue	Add Event Venue		User must be able to add new event type, and venue
EOA-CON-ET-01	Configurations - Venue	Edit Details		User must be able to edit the any details of the Event Type and Venue
EOA-CON-ET-02	Configurations - Venue	Delete Venue		User must be able to delete the Venue
EOA-CON-ET-04	Configurations - Venue	Search Venue		User must be able to Search Venue
<b>Homepage</b>				
				User must be able to view the table of Venue of the following details: a. Title b. Description c. Action
EOA-CON-HP-00-00	Configurations - Homepage	View List of Images		- User must be able to upload images that will be displayed in the front end (homepage) - User must be able to delete the upload pictures
EOA-CON-HP-00-01		Upload Image		
EOA-CON-HP-01	Configurations - Homepage	Search Image		User must be able to search image in Homepage Management
<b>Waiver Agreement</b>				
EOA-CON-WV-00	Configuration - Waiver Agreement	View List of Waivers		User must be able to view the list of Waivers that was uploaded
EOA-CON-WV-01	Configuration - Waiver Agreement	Upload Waiver		- User must be able to upload and delete waiver - User must be able to enable/disable the publishing of waiver - System must only enable one waiver at a time since only one waiver is being used in booking
EOA-CON-WV-02	Configuration - Waiver Agreement	Publishing the Waiver		
<b>System Settings</b>				
Main purpose of this is to be less dependent to the developer to configure things inside the system				
EOA-SS-00	System Settings	View Table of Keys		User must be able to view Table of Keys
EOA-SS-01	System Settings	Edit Key		User must be able to edit the details of Key
EOA-SS-02	System Settings	Publish the Key		- User must be able to tick box to publish the Key added in the System settings - System must be able to display the Key on the Front End
EOA-SS-03	System Settings	Add Key		- User must be able to add key - System must be able to display the new key in the Table of Keys
<b>Non Functional Requirements</b>				
EOA-NFRA-00	Non Functional Requirements	Sending Emails		System must be able to send emails to the users
EOA-NFRA-01	Non Functional Requirements	Storage for Attachments/ Files		System must be able to store different attachments / files

# Coversheet

## Fund Balance Reserve Policy

<b>Section:</b>	IV. Finance
<b>Item:</b>	A. Fund Balance Reserve Policy
<b>Purpose:</b>	Vote
<b>Submitted by:</b>	
<b>Related Material:</b>	PCA Fund Balance Reserves Policy_Proposed 07.18.2023.pdf



Pacific Coast Academy

# Fund Balance Reserve Policy



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## FUND BALANCE RESERVES POLICY

The Board of Directors of Pacific Coast Academy ("Board") states its belief that a key element of the financial stability of Pacific Coast Academy ("School") is ensuring that adequate levels of reserves are maintained. Reserves are essential in mitigating current and future risks that may occur from unforeseen revenue fluctuations and/or unanticipated expenditures, and to fund all existing programs. Reserves provide cash flow liquidity to fund general operations. Prudent reserves afford the school time to thoughtfully identify and implement budget adjustments.

### 1. DEFINITIONS

#### Fund Balance

The difference between the total assets and liabilities of the school, representing the net worth of the organization. As a charter school, Pacific Coast Academy only has a single fund, and the fund balance in its General Fund represents the reserves available to the organization. The accounting terms "fund balance", "net asset balance", "net position", and "reserves" functionally mean the same thing when applied to the School.

#### Restricted Fund Balance

Portion of the fund balance that is subject to external or internal restrictions, such as grants, donations, or legal requirements.

#### Unrestricted Fund Balance

Portion of the fund balance that is available for discretionary use by the school.

### 2. OBJECTIVES

#### Maintain Adequate Reserves

To maintain adequate reserves to address unforeseen financial needs, emergencies, or cash flow fluctuations.

#### Promote Fiscal Responsibility

To promote fiscal responsibility and accountability in the management of the school's financial resources.

#### Support Strategic Initiatives

To allocate funds for strategic initiatives, improvements, and program enhancements that align with the school's mission, vision, and educational goals.

#### Comply with Legal and Regulatory Requirements

To adhere to all relevant laws, regulations, and reporting requirements governing fund balance management for charter schools.

### 3. FUND BALANCE ALLOCATION

#### Minimum Fund Balance

Maintain a minimum fund balance of 5% of the annual operating budget to ensure reserves for economic uncertainty and compliance with State requirements.

#### Maximum Fund Balance

The Board of Directors shall review Pacific Coast Academy's fund balance annually to avoid excessive fund balance accumulation. Excess funds should be utilized for strategic initiatives or returned to stakeholders through program enhancements, instructional spending, or investments in infrastructure.

#### Restricted Funds

Allocate restricted fund balances in accordance with restricted funding requirements, ensuring compliance with regulations and reporting obligations.

#### Unrestricted Funds

Utilize unrestricted fund balances for the following purposes:

- **Reserves for Economic Uncertainty**

Represents an overall 'safety net' for the School to cover a variety of unforeseen mid-term to long-term economic circumstances, including higher than expected outflows in any of the three assignments below. The onset of the COVID-19 pandemic in 2020 is an excellent example of how unforeseen events can require substantial reserves. Within a space of two months, State budget projections reduced projected K-12 funding by up to nineteen percent (19%) for the upcoming year. While federal stimulus ultimately mitigated part of this, there are no guarantees that future unforeseen impacts will be similarly offset. The funds designated for economic uncertainty represent the amounts necessary to protect the School from any combination of unforeseen revenue shortfalls, unexpected costs, and economic uncertainties.

- **Special Education**

Represents a reserve for associated costs in the event a school enrolls a student with exceptional needs requiring services that are not covered by the school's adopted budget or by emergency Special Education Local Plan Area (SELPA) funding. The typical range for this assignment is one to four percent (1-4%) of annual expenditures, and the specific percentage may be set or reset by the Board at any time depending on changing circumstances.

- **Legal**

While much can be done to prevent litigation, even the best planning does not eliminate the risk of litigation. This reserve is earmarked to cover potential legal costs. The typical range is one to four percent (1-4%) of annual expenditures, and the specific percentage may be set or reset by the Board at any time depending on changing circumstances.

- **Cash Flow Reserve**

Reserved to cover short-term delays in cash receipts from governmental sources. California's statewide tax base has become increasingly volatile as dependence on capital gains tax and higher-end income tax brackets has increased over time. This has in turn caused the State to defer or delay monthly K-12 apportionments for months at a time and even into the following fiscal year, with deferrals totaling as much as thirty-five percent (35%) of annual funding. For charter schools without sufficient reserves, this has meant resorting to outside lenders and incurring hundreds of thousands of dollars in interest and fees to obtain interim funding to cover payroll and other critical expenses. The recommended level for this assignment is thirty-five percent (35%) of annual expenditures, matching the high end of recent actual deferrals for some schools, but this percentage may be set or reset by the Board at any time depending on changing circumstances.

- **Capital Expenditures**

Reserve for capital expenditures, including facility improvements, equipment purchases, and technology upgrades.

- **Program Enhancements**

Reserve to support program enhancements, curriculum development, staff professional development, and other initiatives aligned with the school's strategic objectives.

- **Debt Service**

Allocation for potential debt service obligations, including repayment of loans or bonds.

- **Other Strategic Initiatives**

Funds earmarked for any other strategic initiatives approved by the governing board, provided they align with Pacific Coast Academy's mission, vision, and educational goals.

## 4. REVIEW AND REVISION

### Regular Review

The fund balance policy should be reviewed periodically to assess its effectiveness and alignment with policies and regulations, to inform revisions as needed.

# Coversheet

## Approve Minutes

<b>Section:</b>	V. Consent Agenda
<b>Item:</b>	A. Approve Minutes
<b>Purpose:</b>	Approve Minutes
<b>Submitted by:</b>	
<b>Related Material:</b>	Minutes for Regular Scheduled Board Meeting on June 28, 2023

DRAFT



# Pacific Coast Academy

## Minutes

### Regular Scheduled Board Meeting

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#### Date and Time

Wednesday June 28, 2023 at 5:00 PM

#### Location

Pacific Coast Academy Office  
13915 Danielson St. #200, Poway, CA 92064

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#### Directors Present

Benjamin Fung, Eric Banatao, Jessica Ackermann, Kim Gill

#### Directors Absent

Rose Arevalo

#### Guests Present

Jennifer Faber, Krystin Demofonte, Shari Erlendson

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### I. Opening Items

#### A. Call the Meeting to Order

Benjamin Fung called a meeting of the board of directors of Pacific Coast Academy to order on Wednesday Jun 28, 2023 at 5:03 PM.

#### B. Roll Call of Board Members

Rose Arevalo was absent from this board meeting.

#### C.

### **Approval of Agenda**

Jessica Ackermann made a motion to approve the agenda.

Kim Gill seconded the motion.

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

### **D. Public Comments**

There were no public comments.

## **II. Finance**

### **A. Presentation of the 2023-2024 Local Indicators**

### **B. 2023-2024 Local Control Accountability Plan (LCAP)**

Eric Banatao made a motion to approve the 2023-2024 Local Control and Accountability Plan (LCAP).

Kim Gill seconded the motion.

Staff presented the local indicators and the LCAP. Board member Eric Banatao made a motion to approve the 2023-2024 Local Control Accountability Plan (LCAP). Board member Kim Gill seconded the motion. The board Voted unanimously to approve the motion.

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

### **C. Resolution Regarding the Education Protection Account (EPA)**

Jessica Ackermann made a motion to approve the Resolution Regarding the Education Protection Account (EPA).

Kim Gill seconded the motion.

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

### **D. 2023-2024 Education Protection Account (EPA) Spending Plan**

Eric Banatao made a motion to approve the 2023-2024 Education Protection Account (EPA) Spending Plan.

Jessica Ackermann seconded the motion.

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

### **E. 2023-2024 Annual Budget**

Kim Gill made a motion to approve the 2023-2024 Annual Budget.

Eric Banatao seconded the motion.

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

### **F. May Financial Package**

Jessica Ackermann made a motion to approve the May Financial Package.

Kim Gill seconded the motion.

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

**G. Memorandum of Understanding (MOU) South Schools**

Jessica Ackermann made a motion to approve the Memorandum of Understanding (MOU) South Schools.

Kim Gill seconded the motion.

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

**III. Other Business**

**A. Executive Director's Report**

**B. 2023-2024 Board Calendar**

Eric Banatao made a motion to approve 2023-2024 Board Calendar.

Kim Gill seconded the motion.

Approved with the change of the May 16 meeting being changed to May 14.

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

**C. Resolution Regarding Reimbursement for Costs Relating to Grad Night**

Jessica Ackermann made a motion to approve the Resolution Regarding Reimbursement for Costs Relating to Grad Night.

Kim Gill seconded the motion.

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

**D. 2023-2024 Compensation Policy: Salary Schedules and Stipend Chart**

Motion to approve 2023-2024 Compensation Policy: Salary Schedules and Stipend Chart.

The board voted to approve an increase in the Medical Opt out from \$3,000 to \$5,000.

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

**IV. Consent Agenda**

**A. Approve Minutes**

Jessica Ackermann made a motion to Approve Meeting Minutes.

Kim Gill seconded the motion.

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

Jessica Ackermann made a motion to approve the minutes from Regular Scheduled Board Meeting on 05-18-23.

Kim Gill seconded the motion.

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

**B. 2023-2024 Parent Student Handbook**



**C. 2023-2024 Employee Handbook**

**D. Educational Records and Student Information Policy**

**E. Educational Materials and Restitution Policy**

**F. Non-Compliance Policy and Procedure**

**G. Approve Consent Agenda**

Jessica Ackermann made a motion to approve Consent Agenda.

Kim Gill seconded the motion.

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

**V. Closing Items**

**A. Announcement of Next Scheduled Meeting**

**B. Adjourn Meeting**

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:33 PM.

Respectfully Submitted,  
Benjamin Fung

---

Prepared By:  
Jennifer Faber

Noted By:

Board Secretary

Public comment rules: Members of the public may address the Board on agenda or non-agenda items. Please communicate orally your desire to address the board when the board asks for public comments. Speakers may be called in the order that requests are received. We ask that comments are limited to 2 minutes each, with no more than 15 minutes per single topic so that as many people as possible may be heard. If a member of the public utilizes a translator to address the board, those individuals are allotted 4 minutes each. If the board utilizes simultaneous translation equipment in a manner that allows the board to hear the translated public testimony simultaneously, those individuals are allotted 2 minutes each. By law, the Board is allowed to take action only on items on the agenda. The Board may, at its discretion, refer a matter to school staff or calendar the issue for future discussion.

Note: Pacific Coast Academy Governing Board encourages those with disabilities to participate fully in the public meeting process. If you need a disability-related modification or accommodation, including auxiliary aids or services, to participate in the public meeting, please contact the Pacific Coast Academy Office at [\(619\) 749-1928](tel:6197491928) at least 48 hours before the scheduled board meeting so that we may make every reasonable effort to accommodate you. (Government Code § 54954.2; Americans with Disabilities Act of 1990, § 202 (42 U.S.C. § 12132)).

# Coversheet

## 2023-2024 Employee Handbook

**Section:** V. Consent Agenda  
**Item:** B. 2023-2024 Employee Handbook  
**Purpose:**  
**Submitted by:**  
**Related Material:**  
PCA 2022-2023 Employee Handbook\_v3\_Rev 01.06.2023\_Redlined 06.16.2023.pdf



Pacific Coast Academy

# Employee Handbook

~~2022-2023~~ 2023-2024

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## SECTION 1 – WELCOME

Welcome to Pacific Coast Academy!

We are happy to have you join us at Pacific Coast Academy (PCA or School). We believe our school is truly unique. We serve a diverse group of talented and hardworking students. We regard the work we do as being of utmost importance. Therefore, we have very high expectations for professionalism and performance for each one of our employees. All employees should treat all individuals, including students, teachers, administrators, volunteers, and family members, with respect, and approach all situations as opportunities to learn.

This handbook has been written to provide you with an overview of PCA, its personnel policies and procedures, and your benefits as a PCA employee.

This handbook is intended to explain in general terms those policies that most often apply to your day-to-day work activities. This handbook cannot anticipate every situation or answer every question about employment, and it is not an employment contract. Employees are expected to read this handbook thoroughly upon receipt, to know and abide by the policies outlined herein, and as revised over time, throughout their employment. No PCA guideline, practice, manual or rule may alter the “at-will” status of your relationship with PCA.

In order to retain necessary flexibility in the administration of its policies, procedures and benefits, PCA reserves the right to change, deviate from, eliminate, or revise the handbook, except for the at-will provisions, at any time, without notice, whenever PCA determines that such action is warranted. For these reasons, we urge you to check with your supervisor to obtain current information regarding the status of any particular policy, procedure or practice. This handbook supersedes and replaces all previous personnel policies, practices and procedures.

We welcome you and wish you great success and fulfillment at PCA.

## SECTION 2 – GENERAL

This handbook serves as a guide for the employer/employee relationship. This handbook applies to faculty and staff at PCA.

This handbook contains only general information and guidelines. It is not intended to be comprehensive or to address all the possible applications of, or exceptions to, the general policies and procedures described. For that reason, if you have any questions concerning eligibility for a particular benefit, or the applicability of a policy or practice to you, you should address your specific questions to your supervisor or Human Resources. You are responsible for reading, understanding, and complying with the provisions of this handbook. Our objective is to provide you with a work environment that is constructive to both personal and professional growth.

Neither this handbook nor any other PCA document confers any contractual right, either express or implied, to remain in PCA's employ, nor does it guarantee any fixed term or condition of your employment. Except as otherwise provided in an executed employment agreement, your employment is not for any specified period of time and may be terminated at will, with or without cause and without prior notice, by PCA or you may resign for any reason at any time.

No supervisor or other representative of PCA except the Executive Director, with the approval of the Board of Directors, has the authority to enter into any agreement for employment for any specified period of time, or to make any agreement contrary to the above. Further, the procedures, practices, policies and benefits described herein may be modified or discontinued from time to time with or without advance notice. We will try to inform you of any changes as they occur.

## SECTION 3 – PHILOSOPHY

### CORE PURPOSE

- PCA exists to inspire children to realize their potential to become extraordinary and active members of society.

### CORE VALUES

The following three core values are what distinguish PCA from other schools:

- Mentoring – to inspire students to forge their paths in the world
- Passionate – to strive for excellence
- Collaborative – to be active, engaging, and contributing team members

### PERMISSION-TO-PLAY VALUES

The following Permission-to-Play values are minimum behavioral standards that all employees must exhibit consistently:

- Innovative
- Dynamic
- Results-oriented
- Data-driven
- Extraordinary
- Confident
- Energetic

### STRATEGIC ANCHORS

To ensure success of our core purpose and core values, PCA will use the following two strategic anchors to inform every decision the school makes and the basis for how decisions and actions will be evaluated:

- Academic achievement through relevant curricula, clear expectations, and shared accountability
- Relationship building through mentorship and consistent communication

### SCHOOLWIDE LEARNER OUTCOMES

At Pacific Coast Academy, we have goals for our students that are known as Schoolwide Learner Outcomes (SLOs). SLOs are a part of our school culture: they reflect our school vision, the College and Career Readiness standards, and the education of the whole child.

Pacific Coast Academy's Students are:

- **Inquisitive Learners** - Inquisitive learners are investigative, inquiring, ask probing questions, and desire to learn more.
- **Navigators of the Digital World** - Navigators of the digital world who are proficient in the use of technology, media, and online resources.
- **Self-Directed** - Self-directed and motivated students who are able to set attainable goals to achieve academic success.
- **Personalized Learners** - Personalized learners who are able to thrive in the style of education that best fits their individual needs.
- **Independent Critical Thinkers** - Independent critical thinkers who have the ability to problem solve, take ownership, and apply their knowledge to a variety of problems.
- **Responsible Citizens** - Responsible citizens who demonstrate integrity and respect while actively seeking knowledge of local and global issues.
- **Effective Communicators** - Effective communicators who can thoughtfully articulate their thinking with confidence while collaborating with peers.

## SECTION 4 – EMPLOYMENT

### EMPLOYMENT APPLICATIONS

We rely upon the accuracy of information contained in the employment application and the accuracy of other data presented throughout the hiring process and employment. Any misrepresentations, falsifications, or material omissions in any of this information or data may result in exclusion of the individual from further consideration for employment or, if the person has been hired, termination of employment.

### AT WILL EMPLOYMENT

We believe that an employment relationship is successful as long as both parties are mutually satisfied. Accordingly, both you and PCA will have the right to terminate your employment and all related compensation and benefits at any time, with or without cause and with or without notice. In addition, PCA may eliminate or change any term or condition of your employment (including but not limited to your job assignment, duties, or salary) at will, at any time, for any reason not prohibited by law, with or without cause and with or without previous notice.

This is called “employment at will,” and no one other than the Executive Director of PCA with the approval of the Board of Directors, has the authority to alter your employment at-will status, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to this policy. Further, any such agreement must be in writing and must be signed by the Executive Director. Statements of specific grounds for termination set forth in this Handbook, or elsewhere, are not all-inclusive and are not intended to restrict PCA’s right to terminate at-will.

### EQUAL EMPLOYMENT OPPORTUNITY

PCA is an equal opportunity employer. In accordance with applicable law, PCA ~~prohibits discrimination against any employee or applicant for employment on the basis of an individual’s protected status, including race (which includes, but is not limited to, traits historically associated with race, including, but not limited to, hair texture and protective hairstyles), color, religious creed (which includes, without limitation to religious dress and grooming practices), gender, gender identity, gender expression, color, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability, mental disability, medical condition, genetic information, age, sexual orientation, marital status, parental status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), gender, gender identity/expression, military service, veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status or related protected activities (which includes undocumented individuals and human trafficking), protected medical leaves, domestic violence victim status, political affiliation, or any other consideration protected by applicable law. Also in accordance with applicable law, PCA prohibits discrimination against any qualified disabled employee or applicant, against a disabled veteran, or against a veteran of the Vietnam era with a physical or mental disability. These categories include a perception that the individual has any of these~~

~~characteristics or is associated with a person who has (or is perceived to have) any of these characteristics. PCA will ensure that applicants and employees are treated in all aspects of employment without unlawful discrimination because of these or any other protected basis. Such aspects of employment include, but are not limited to, recruitment, hiring, promotion, demotion, transfer, layoff, termination, compensation, and training. Additionally, in accordance with applicable law, PCA prohibits all forms of unlawful harassment of a sexual or other discriminatory nature. Any conduct contrary to this policy is prohibited. This policy applies to all applicants and employees of PCA.~~ prohibits discrimination against any employee or applicant for employment on the basis of an individual's protected status, including race (which includes historically associated traits, such as hair styles and protective hair styles, e.g., braids, locks, and twists), color, religious creed (which includes, without limitation to religious dress and grooming practices), gender, gender identity, gender expression, transgender identity whether or not the employee is transitioning or has transitioned, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability (including HIV and AIDS), mental disability, medical condition (including cancer and genetic characteristics), genetic information, age (forty (40) and over), sexual orientation, marital status, registered domestic partner status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), reproductive health decision-making (including but not limited to a decision to use or access a particular drug, device or product or medical services for reproductive health), military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status or related protected activities (which includes undocumented individuals and human trafficking), protected medical and other protected leaves, domestic violence victim status, political affiliation, or any other consideration protected by applicable law. These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics. PCA will ensure that applicants and employees are treated in all aspects of employment without unlawful discrimination because of these or any other protected basis. Such aspects of employment include, but are not limited to, recruitment, hiring, promotion, demotion, transfer, layoff, termination, compensation, and training.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, PCA will make a good faith effort to provide reasonable accommodations for the known physical or mental limitations of an otherwise qualified applicant or employee with a disability, unless undue hardship would result to PCA. An applicant or employee who believes they require an accommodation in order to perform the essential functions of the job should contact Human Resources and request such an accommodation, specifying what accommodation they need to perform the job. PCA will analyze the situation, engage in an interactive process with the individual, and respond to the individual's request.

If you believe you have been subjected to discrimination, please follow the complaint procedure outlined below.

## HARASSMENT

It is the policy of PCA to ensure equal employment opportunity without harassment on the basis of race (which includes, but is not limited to, traits historically associated with race, including, but not limited to, hair texture and protective hairstyles), religious creed (which includes, without limitation, to religious

dress and grooming practices), gender, gender identity, gender expression, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability, mental disability, medical condition, genetic information, age, sexual orientation, marital status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), **reproductive health decision-making (including but not limited to a decision to use or access a particular drug, device or product or medical services for reproductive health)**, military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status or related protected activities (which includes undocumented individuals and human trafficking), protected medical leaves, domestic violence victim status, political affiliation, or any other consideration made unlawful by federal, state, or local laws, ordinances, or regulations. These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics.

PCA prohibits any such harassment in the workplace. In addition, we prohibit abusive conduct/workplace bullying in the work environment. It is our mission to provide a professional work and learning environment free of harassment, discrimination and/or workplace bullying and that maintains equality, dignity, and respect for all. This policy protects all employees of the School as well as interns, volunteers, and potential employees (applicants). All employees of the School are required to abide by this policy, regardless of position or status, including supervisors, administration, and co-workers. In addition, this policy prohibits unlawful harassment by third parties, including students, parents, vendors or other third parties, who have workplace contact with our employees. This policy applies to all applicants and employees (or other listed individuals), whether related to conduct engaged in by fellow employees or someone not directly connected to PCA (e.g., an outside vendor, consultant or customer). Conduct prohibited by these policies is unacceptable in the workplace and in any work-related setting outside the workplace, such as during business or field trips, meetings and business or school-related social events.

### What is Harassment?

Harassment can take many forms. As used in this Employee Handbook, the term “harassment” includes all unwelcome conduct that comprises the following behavior pertaining to any of the above protected categories or characteristics:

- Offensive remarks, comments, jokes or slurs pertaining to an individual’s race, religion, sex, sexual orientation, gender or gender identity or gender expression, age, national origin or ancestry, disability, citizenship, veteran status, or any other protected status as defined by law or regulation whether verbally or by electronic means including email, and/or text messages
- Offensive sexual remarks, sexual advances, flirtations, or requests for sexual favors regardless of the gender of the individuals involved and whether verbally or by electronic means
- Offensive physical conduct, including, but not limited to, touching, blocking normal movement or interfering with another’s work regardless of the gender of the individuals involved, including, but not limited to threats of harm, violence or assault
- Offensive pictures, drawings or photographs or other communications, including email, text

messages, or other forms of electronic communication

- Holding work functions in inappropriate venues, such as a strip-club
- Sex or gender based practical jokes, sexual favoritism
- Threatening reprisals due to an employee's refusal to respond to requests for sexual favors or for reporting a violation of this policy
- Unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature, regardless of gender, when:
  - Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment
  - Submission to, or rejection of, such conduct by an individual is used as a basis for employment decisions affecting such individual
  - Such conduct has the purpose or effect of substantially interfering with the individual's work performance or creating an intimidating, hostile or offensive working environment

### What Is Abusive Conduct/Workplace Bullying?

- Conduct of an employee in the workplace that a reasonable person would find hostile, threatening, intimidating, humiliating and unrelated to an employer's legitimate business interests. Examples may include:
  - Use of derogatory remarks, insults and/or epithets.
  - Verbal or physical conduct that sabotages or undermines a person's work performance that is threatening, humiliating or intimidating.
- Bullying, gossip, profanity, abusive conduct and negative comments are destructive to our School culture, create false rumors, disrupt school operations and interfere with the privacy of others.

### What is Retaliation?

Retaliation against an individual for reporting harassment, discrimination, or for participating in an investigation of a claim of such conduct is a serious violation of this policy and, like harassment or discrimination itself, will be subject to disciplinary action. Acts of retaliation should be reported immediately and will be promptly investigated and addressed.

As used in this policy, "retaliation" means taking any adverse employment action against an employee because the employee engaged in protected activity pursuant to this policy. Protected activity may include, but is not necessarily limited to, reporting or assisting in reporting suspected violations of this policy, cooperating or participating in investigations or proceedings arising out of a violation of this policy, or engaging in any other activity protected by applicable law.

As used in this policy, an "adverse employment action" means conduct or an action that materially affects the terms and conditions of the employee's employment status or is reasonably likely to deter the employee from engaging in further protected activity. Adverse employment actions may include, but are not limited to, the following: demotion; suspension; reduction in pay; denial of a merit salary increase; failure to hire or consider for hire; refusing to promote or consider for promotion because of reporting a violation of this policy; harassing another employee for filing a complaint; denying employment



opportunities; changing an employee's work assignments for identifying harassment or other forms of discrimination in the workplace; treating an employee differently such as denying an accommodation; not talking to an employee (the "cold shoulder") when otherwise required by job duties; or otherwise excluding the employee from job-related activities because of engagement in activities protected under this policy.

Any retaliatory adverse action because of a protected activity will not be tolerated. If an employee believes they have been subjected to, has witnessed, or has knowledge of retaliation in violation of this policy, please follow the complaint procedure outlined below.

### Responsibility

All PCA employees have a responsibility for keeping our work environment free of harassment, discrimination, retaliation and abusive conduct in accordance with this policy.

### Reporting

PCA encourages reporting of all perceived incidents of discrimination, harassment, abusive conduct or retaliation, regardless of the offender's identity or position. Individuals who believe that they have been subjected to such conduct should immediately discuss their concerns with their immediate supervisor, the Executive Director or Human Resources. Do not report your complaint to any individual who has allegedly engaged in the inappropriate behavior that is the subject of your complaint. In addition, PCA encourages individuals who believe they are being subjected to such conduct to promptly advise the offender their behavior is unwelcome and request that it be discontinued. Often this action alone will resolve the problem. PCA recognizes, however, that an individual may prefer to pursue the matter through formal complaint procedures. Every effort will be made to keep such reports as confidential as possible, although confidentiality cannot be guaranteed. PCA is serious about enforcing its policy against harassment; however, PCA cannot resolve a harassment problem that it does not know about. Therefore, employees are responsible for bringing any such problems to PCA's attention so it can take whatever steps are necessary to correct the problems.

All employees who witness potential violations of this policy, and particularly supervisors, are required to immediately report such incidents to their immediate supervisor, the Executive Director, or Human Resources. Supervisors must report any and all conduct of which they are made aware, which violates, or may violate, policies regarding discrimination, unlawful harassment, or retaliation to Human Resources, the Executive Director or the Chair of the Board of Directors, if appropriate. Supervisors who fail to report alleged violations may be subject to disciplinary action, up to and including termination.

All complaints submitted pursuant to this policy can be done in writing or verbally. Your complaint should be specific and should include the names of the individuals involved, the names of any witnesses, and any supporting documentation. Employees may choose to submit their complaints anonymously.

### Investigation/Complaint Procedure

All complaints of harassment, discrimination, retaliation or abusive conduct will be promptly investigated.

PCA encourages the prompt reporting of complaints or concerns so that rapid and appropriate remedial

action can be taken before relationships become irreparably strained. Therefore, while no fixed reporting period has been established, early reporting and intervention have proven to be the most effective method of resolving actual or perceived incidents of harassment.

PCA's investigation methods will vary depending on the nature of the complaint, the allegations, the witnesses, and other factors. The investigation may include individual interviews with the parties involved and, where necessary, with individuals who may have observed the alleged conduct or may have other relevant knowledge. All complaints will be handled as confidentially as possible and information will be disclosed only as it is necessary to complete the investigation and resolve the matter.

All employees are required to fully cooperate with PCA's investigation. which includes, but is not limited to, providing all pertinent information in a truthful manner, submitting pertinent documents in their possession, not interfering with the investigation in any manner, and maintaining an appropriate level of discretion regarding the investigation. Failure to do so may result in disciplinary action, up to and including termination.

During the investigation, PCA will provide regular progress updates, as appropriate, to those directly involved. PCA will strive to complete its investigation as efficiently as possible in light of the allegations and will reach any conclusions based on the evidence collected and credibility of the witnesses.

PCA may investigate conduct in the absence of a formal complaint if PCA has reason to believe that an individual has engaged in conduct that violates PCA policies or applicable law. Further, PCA may continue its investigation even if the original complainant withdraws their complaint during the course of the investigation.

Any conduct which PCA believes constitutes harassment, discrimination, abusive conduct, or retaliation in violation of this policy will be dealt with appropriately. Corrective action may include, for example, training, referral to counseling and/or disciplinary action such as warning, reprimand, withholding of a promotion or pay increase, reassignment, temporary suspension without pay or termination, as PCA believes appropriate under the circumstances. Due to privacy protections, PCA may not be able to fully disclose its entire decision regarding corrective action to the complainant. False and malicious complaints of harassment, discrimination, abusive conduct, or retaliation as opposed to complaints, which, even if erroneous, are made in good faith, may be the subject of appropriate disciplinary action.

## Conclusion

This policy was developed to ensure that all employees work in an environment free from harassment, discrimination, abusive conduct and retaliation. PCA will make every reasonable effort to ensure that all concerned are familiar with these policies and aware that any complaint in violation of such policies will be investigated and resolved appropriately. Any employee who has questions or concerns about these policies should talk with Human Resources or the Executive Director. Finally, these policies should not, and may not, be used as a basis for excluding or separating individuals of a particular gender, or any other protected characteristic, from participating in business or work-related social activities or discussions. In other words, no one should make the mistake of engaging in discrimination or exclusion in order to avoid allegations of harassment. The law and the policies of PCA prohibit disparate treatment on the basis of

sex or any other protected characteristic, with regard to terms, conditions, privileges and prerequisites of employment. The prohibitions against harassment, discrimination, abusive conduct, and retaliation are intended to complement and further those policies, not to form the basis of an exception to them.

If you believe you have experienced discrimination, harassment, or abusive conduct you may file a **Civil Rights** Department ~~of Fair Employment and Housing~~ ("CRD ~~DFEH~~") or Equal Employment Opportunity Commission complaint. For information contact the ~~DFEH~~ CRD or EEOC. You may find their phone numbers online at [www.eeoc.gov](http://www.eeoc.gov) and [www.dfeh.ca.gov](http://www.dfeh.ca.gov), <http://www.cacivilrights.ca.gov> respectively.

## TITLE IX

Title IX provides for separate processes and procedures for sexual harassment and sexual assault when the type of conduct falls within the definitions of sexual harassment and sexual assault as provided in 34 C.F.R. § 106.30. In addition, the conduct must have taken place at school locations, events or circumstances over which the School exercised substantial control over both the individual who has been accused of sexual harassment and/or assault and the context in which the sexual harassment occurs. For these types of complaints, the School will follow the Title IX policy processes and procedures, which may be found in the School's Title IX grievance policy. If the conduct does not fall within Title IX, this policy will be followed. There may be instances where the conduct falls within both policies and the School will follow both policies. The School's Title IX Coordinator is Yolanda Osborne, Phone: (619) 215-0704 x 4022, Email: [Yolanda.Osborne@pacificcoastacademy.org](mailto:Yolanda.Osborne@pacificcoastacademy.org).

## TRAINING REQUIREMENTS

PCA requires all employees to abide by California's training requirements, which includes training within six months of hire and retraining every two years thereafter. Employees who fail to complete this required training will be subject to disciplinary action, up to and including termination.

## WHISTLEBLOWER POLICY

PCA is committed to maintaining a workplace where employees are free to raise good faith concerns regarding certain business practices, specifically: (1) reporting suspected violations of law, including but not limited to federal laws and regulations; (2) providing truthful information in connection with an inquiry or investigation by a court, agency, law enforcement, or other governmental body; and (3) identifying potential violations of PCA policy, specifically the policies contained in PCA's Employee Handbook.

An employee who wishes to report a suspected violation of law or PCA Policy may do so by contacting the Executive Director, Deputy Executive Director, or Human Resources.

PCA expressly prohibits any form of retaliation, including harassment, intimidation, adverse employment actions, or any other form of retaliation, against employees who raise suspected violations of law, cooperate in inquiries or investigations, or identify potential violations of PCA policy. Any employee who engages in retaliation will be subject to discipline, up to and including termination.

Any employee who believes they have been subjected to any form of retaliation as a result of reporting a

suspected violation of law or policy should immediately report the retaliation to one of the following: the Executive Director, Deputy Executive Director, or Human Resources. Any supervisor, manager, or human resources staff member that receives complaints of retaliation must immediately inform the Executive Director or Chair of the Board of Directors, if appropriate.

Reports of suspected violations of law or policy and reports of retaliation will be investigated promptly and in a manner intended to protect confidentiality as much as possible (although confidentiality cannot be guaranteed) and consistent with a full and fair investigation. Human Resources and a member of PCA's administration will conduct the investigation or designate other internal or external parties to conduct the investigations. The investigating parties will notify the concerned individuals of their findings as appropriate.

## OPEN COMMUNICATION POLICY

We want to hear from you. PCA strongly encourages employee participation in decisions affecting their employment and their daily professional responsibilities. Our greatest strength lies in our employees and our ability to work together. We encourage open communication about all aspects of our school and organization. Employees are encouraged to openly discuss with their supervisors any problems or suggestions they believe would make our organization better and stronger. PCA is interested in all our employee's success and fulfillment. We welcome all constructive suggestions and ideas.

Employees who have work-related concerns or complaints are encouraged to discuss them with their supervisor or the Executive Director. Employees are encouraged to raise their work-related concerns as soon as possible after the events that cause concern. PCA will attempt to keep the employee's concerns and complaints and any resulting investigation confidential to the extent feasible. However, in the course of an investigation and/or in resolving the matter, some dissemination of information to others may be necessary, appropriate, and/or required by law. Employees with concerns or complaints relating to harassment, discrimination or retaliation should follow the reporting procedure outlined in this Handbook.

## LACTATION ACCOMMODATION POLICY

PCA provides a reasonable amount of break time to accommodate an employee's need to express breast milk for the employee's infant child.

A private location to express breast milk will be provided in close proximity to the employee's work area. The employee's normal work area may be used if it allows the employee to express milk in private. In certain circumstances, a temporary location, multipurpose room, or shared space may be provided in accordance with applicable law. The location will also meet the following requirements: not be a bathroom; be free from intrusion; be shielded from view; be safe, clean, and free of hazardous materials; contain a surface to place a breast pump and personal items; contain a place to sit; and have access to electricity or alternative devices, including, but not limited to, extension cords or charging stations, needed to operate an electric or battery-powered breast pump. In addition, the School shall provide access to a sink with running water and a refrigerator suitable for storing milk in close proximity to the

employee's work area. If a refrigerator cannot be provided, the School may provide another cooling device suitable for storing milk, such as a School-provided cooler.

~~The School reserves the right to deny an employee's request for a lactation break if the additional break time will seriously disrupt operations.~~

Employees requesting an accommodation under this policy should comply with the following requirements:

- The employee should complete an accommodation request form and contact the employee's supervisor or Human Resources to request designation of a location and time to express breast milk under this policy.
- The requested break time should, if possible, be taken concurrently with other scheduled break periods. Nonexempt employees should clock out for any lactation breaks that do not run concurrently with normally scheduled rest periods. Any such breaks will be unpaid.

~~The School will engage the employee in an interactive process with the employee to determine when and where lactation breaks will occur, and will respond accordingly, generally within two business days. The School reserves the right to deny an employee's request for a lactation break if the additional break time will seriously disrupt operations.~~

Retaliation for making a lactation accommodation request is strictly forbidden. If the employee believes they have been retaliated against it should be reported immediately to their supervisor, Human Resources or Executive Director. Discrimination against and harassment of lactating employees in any form is unacceptable, a form of prohibited sex/gender discrimination, will not be tolerated at PCA and will be handled in accordance with PCA's policy on discrimination and harassment.

If any employee believes they have experienced retaliation or discrimination as a result of conduct protected by this policy, the employee may also file a complaint with their supervisor and/or the Labor Commissioner's Office. For more information, contact the Labor Commissioner's Office by phone or visit a local office by finding the nearest one on the website: [www.dir.ca.gov/dlse/DistrictOffices.htm](http://www.dir.ca.gov/dlse/DistrictOffices.htm). The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

## PUBLIC RELATIONS

The success of a school depends upon the quality of the relationship among the school, its employees, students, parents and the general public. The public impression of PCA and its interest in our school will be formed in part, by PCA employees. Our employees are ambassadors. The more goodwill an employee promotes, the more employees, students, parents and the general public will respect and appreciate the employee, PCA, and our school's services.

Below are several things employees can do to help leave people with a good impression of PCA. These are the building blocks for our continued success:

- Communicate with parents regularly
- Act competently and deal with others in a courteous and respectful manner
- Communicate pleasantly and respectfully with other employees at all times
- Follow up on requests and questions promptly, provide business-like and personable replies to inquiries and requests, and perform all duties in an orderly manner
- Respond to email and voicemail within 24 hours during the workweek
- Take great pride in your work and enjoy doing your very best

## SECTION 5 – THE EMPLOYMENT PROCESS

### EMPLOYEE STATUS AND CLASSIFICATIONS

Each PCA employee is either a “full-time,” “part-time,” or “temporary” employee and either an “exempt” or “non-exempt” employee. Some of the policies and benefits described in this handbook depend on whether the employee is full-time or part-time. Full-time employees are those employees regularly scheduled to work 35 or more hours or more each week. Part-time employees are those regularly scheduled to work less than 35 hours each week. Temporary employees are those employed for short-term assignments or in connection with a specific project or event. Temporary employees are not eligible for employee benefits, except those mandated by applicable law.

Every member of the team is designated as a “Certificated employee” or “Classified employee.” Some of the policies and benefits described in this handbook depend on how the employee is designated.

#### Exempt

This category includes all employees who are determined by the School to be exempt from certain wage and hour provisions of state and federal laws. Exempt employees are paid a fixed salary that is intended to cover all of the compensation to which they are entitled. Exempt employees will be expected to work the number of hours necessary to complete their assigned responsibilities. Because they are exempt, such employees are not entitled to additional compensation for extra hours of work. Typically, full-time Teachers and Administrators are exempt employees.

#### Non-Exempt

This category includes all employees who are covered by certain wage and hour provisions of state and federal laws. Non-exempt employees are entitled to overtime and double time pay as well as meal and rest breaks, as prescribed by law. Typically, all part-time and temporary employees are non-exempt. Additionally, most Classified staff are typically non-exempt employees.

#### Certificated Employee

Certificated Employees are teachers and administrators and work according to specified days on their board approved staff calendar.

#### Classified Employee

Classified Employees include those employees hired by PCA that do not primarily instruct students, nor require state certification, such as maintenance, assistants and other operational employees.

### WORK SCHEDULES

All employees will be assigned a work schedule suitable for their job assignment and will be expected to begin and end work according to the schedule. Please note that schedules may vary depending on a variety of factors including whether you work during the academic year or on an annual basis. The Executive Director or your supervisor will assign your individual work schedule. In order to accommodate

the needs of our business, it may be necessary to change individual work schedules on either a short-term or long-term basis. All employees are expected to be at their desks or workstations at the start of their scheduled shift, ready to work. If you need to modify your schedule, request the change with Human Resources or your supervisor. All schedule changes or modifications must be approved by the Executive Director.

PCA reserves the right to assign employees to jobs other than their usual assignment when necessary, provided the employee is capable of performing the essential functions of the alternate assignment.

Non-exempt employees are not to work before or to continue working after their scheduled hours unless specifically assigned by the supervisor. Non-exempt employees are not allowed to work “off the clock.” Attendance at School-sponsored functions is not compensated unless the supervisor has required you to attend. Employees violating these rules may be subject to disciplinary action up to and including termination.

## SPECIAL VIRTUAL CLASSROOM EMPLOYMENT CONDITIONS

### Position Responsibilities

- Teachers may be assigned a “Virtual Class” or “Virtual Classes.”
- Teachers are provided, at PCA’s expense, a computer capable of maintaining a high-speed internet connection for their entire virtual class.
- Teachers must be available each school day from 8:30 a.m. – 5:00 p.m. by internet and/or phone.
- Teachers **may** be required to conduct a virtual classroom session **up to** two (2) hours per day for grades TK – 8 and **up to** three (3) hours per day for grades 9 – 12.
- Teachers must have access to a phone for calling/responding to students/parents during the teacher’s scheduled time within two (2) hours by phone or four (4) hours by internet.
- Teachers will use the tracking and monitoring system integrated into the student’s assigned course. Teachers will provide continual monitoring of the student’s progress and their scheduled benchmarked progress status.
- Teachers will be responsible for all virtual school required record keeping and reporting.

### Training

Teachers are required to attend training sessions hosted virtually or in-person. Mileage reimbursement will follow standard PCA protocols and procedures.

### Worksites

Most classes will be held virtually. Teachers may work from home.

## REMOTE WORK POLICY

The conditions of remote work include, but are not limited to the following:



## EMPLOYEE EXPECTATIONS

### Availability

As a condition of working on a remote basis, the employee must be available for contact via telephone and email and perform work during their normal scheduled hours. For designated meetings and as requested by the supervisor, staff will be required to have their cameras on, be engaged in the conversation, and be prepared to respond when asked. Unless expressly authorized by their supervisor, non-exempt employees do not have permission to work at any time outside of their scheduled hours. If an employee will not be available for work during their normal hours, the employee must notify and obtain advanced approval from their supervisor.

### Timekeeping Requirements

Non-exempt employees working remotely must comply with the School's timekeeping and meal and rest period policies while working remotely. Specifically, employees must accurately record all hours worked remotely in the School's timekeeping system. This means employees must record all times the employee begins, stops, or resumes working remotely. Non-exempt employees are also required to take a meal period while working remotely in accordance with school policies and must accurately record the start and stop times of each meal period. Employees are not required to record the times of any rest periods. If an employee forgets to record any hours worked or the start and stop times of meal periods or experiences any issues with taking required meal or rest periods, the employee must immediately report these issues to their supervisor and Human Resources.

### Compliance With School Policies

Employees must comply with all School policies and procedures while working remotely, including, but not limited to, all policies and procedures governing Employee's use of the School's electronic communications and computer systems and Confidential Information, including but not limited to student information.

### Leave of Absence

Employees must request and obtain written approval for any leave taken in the same manner as though the employee were not working remotely.

### Security Measures

Employees must continue to follow approved safeguards in order to protect the data, property, records and assets of the School. All work product done at the home work area will be treated in the same manner as work product from the School's primary location and is the property of the School. All records, computer files, and correspondence must be safeguarded for return to the School's primary location. Computer files must be regularly backed up and saved. All School property, unless otherwise specifically authorized by a supervisor, must be returned to the School's primary location upon the employee's conclusion of the remote work period. Employee is expected to ensure the protection of student and personnel privacy concerns, including, but not limited to ensuring that no private student information requiring protection by FERPA is disclosed to third parties without the parent's/guardian's consent,

protecting School computers from access by third persons, keeping confidential information in locked cabinets and any other protective measures in light of your particular position.

### Travel

Employees must remain available to be physically present at the work site as needed by School operations. Employees may not work remotely from other states or locations which prevent physical presence without written permission.

Remote work is not a substitute for dependent care. Employees shall remain available during agreed upon work hours to work for the School.

### Workspace Safety

- While working from home, Employee shall maintain a clearly defined workspace that is kept clean, orderly and free from hazardous conditions.
- The work area shall have adequate light so the Employee may successfully perform the requirements of the Employee's job.
- All exits from the worksite shall be free from obstructions.
- All equipment used by Employee (both School provided and Employee owned) shall be in good working condition.
- Employee's desk, chair and other equipment are appropriately designed and arranged to eliminate strain on all parts of the body. Employee shall indemnify Employer for any injury to third parties at the teleworking location.
- If the Employee is injured while performing work in the course of scope of Employee's employment with the School while working at home, Employee shall notify the Employee's supervisor immediately. During work hours and while performing work functions in the designated work area of the home, Employee is covered by worker's compensation, only during agreed upon work hours.

### Equipment, Tools, and Materials

- School will supply Employee with necessary office supplies to perform the Employee's job. School will not reimburse Employee for any additionally purchased supplies without the prior written consent of the Employee's supervisor.
- Employee acknowledges that all School provided equipment and tools required for Employee to perform that Employee's job remain the property of the School. The School will provide for repairs to School equipment and tools only. The Employee is responsible for repairs to any Employee-owned equipment or tools used by Employee. The Employee is financially responsible for School owned equipment and tools if any are lost, stolen or damaged because of that employee's intentional conduct, gross negligence, misuse or abuse.
- No one other than Employee shall use any School provided equipment or tools for any purpose and Employee shall only use School provided equipment and tools for business purposes.
- Within three (3) days of written notice, Employee must return School owned equipment for

inspection, repair, replacement, or repossession.

- If the Employee's employment is terminated, Employee agrees to return all School owned equipment, tools and materials to School within 48 hours of receiving a shipping label or ability to drop off at a school site.

### Miscellaneous

- An employee's ability to work remotely remains at the sole and absolute discretion of the School. As with all of its policies and procedures, the School reserves the right to modify, alter, or otherwise amend this policy at its sole and absolute discretion.
- Unless otherwise required by law, remote working is voluntary.
- Employee understands that Employee is responsible for tax consequences, if any, of this arrangement.

## ATTENDANCE AND PUNCTUALITY

Employees are expected to observe regular attendance and be punctual. Each of our employees is critical to our success. Therefore, regular attendance and punctuality is considered an essential function of all positions. **Employees are expected to report to work as scheduled, on time, and prepared to work. Employees also are expected to remain at work for their entire work schedule, except meal periods, rest periods or when required to leave on authorized School business. Late arrivals, early departures or other unanticipated and unapproved absences from scheduled hours are disruptive and must be avoided.** If you are unable to report for work on any particular day, you must call your supervisor at least one hour before the time you are scheduled to begin working for that day. If you call in less than one hour before your scheduled time to begin work, you will be considered tardy for that day. Absent extenuating circumstances or a medical provider's order excusing you from work for a period of time, you must call in on any day you are scheduled to work and will not report to work. The School understands that in some cases, advance notice is not possible. In these cases, notify your supervisor personally at the earliest possible moment. In some circumstances, you may be required to provide verification of the reason or documentation for your absence.

More than three instances of non-illness related tardiness by any employee during any twelve-month period are considered excessive. Any unexcused absence is considered excessive.

If you fail to report for work without any notification to your supervisor and the absence continues for a period of three business days, the School will determine that you have abandoned your job and voluntarily terminated your employment.

**Absences protected by local, state and federal law do not count as violations of this policy. Paid sick time protected under California law does not count as a violation of this policy.**

## PROFESSIONAL DEVELOPMENT

Employees are expected to attend and participate in all professional development sessions and other school sponsored training that may be scheduled. While we understand that scheduling conflicts may

arise, consistent tardiness, absenteeism and early departures may result in disciplinary action. Mandatory professional development or other mandatory staff meetings that are missed are required to be made up by the employee at the School's sole discretion and at a time scheduled solely in the School's discretion. Failure to participate in mandatory professional development or other mandatory staff meetings may result in disciplinary action.

When an employee attends a School sponsored professional development and/or training, the time spent in attendance shall be counted as time worked. All employees are required to sign-in and out for the purpose of record keeping. These records will serve as the official roster of attendance.

PCA will pay hourly employees for attendance at mandatory training, lectures and meetings outside of regular working hours at the employee's hourly rate. As exempt employees, salaried staff may be required to attend training seminars that may be outside of PCA's normal business hours with no additional pay, including missed professional development or other mandatory staff meetings.

In the event that an employee must leave early or is unable to attend a scheduled training (i.e., Professional Development sessions), during their normal work hours, an employee MUST put in a time-off request according to the time-off policy. Employees will be required to attend make-up sessions of any missed training.

Failure to comply with this policy may result in disciplinary action.

## TIME RECORDS (NON-EXEMPT EMPLOYEES)

Non-exempt employees must accurately complete time records within the School's time keeping system on a daily basis. Each time record must show the exact time each work period began and ended, and the meal periods taken. Absences and overtime must be accurately identified on your time record. **Any work performed before or after any regularly scheduled work shift must be approved in advance by the employee's supervisor or school leadership.** Non-exempt employees are not allowed to work "off the clock." All time actually worked must be recorded. This includes the use of laptops, computers, PDAs or cell phones to check work email, voicemail or to send text messages after hours. You cannot record time and/or submit a time record for another employee. **Employees must record all time actually worked. Any errors on an employee's time record should be reported immediately to the employee's supervisor or Human Resources.** Submission of your electronic timecard indicates you have certified the hours entered are accurate and you have adhered to all policies and procedures.

Exempt employees must report full days of absence from work. Deductions from an exempt employee's salary will be made only in accordance with applicable law. Employees should immediately contact Human Resources with any questions concerning their pay so that inadvertent errors can be corrected.

## WORKWEEK AND WORKDAY

PCA's workweek is from Sunday at 12:00 A.M. through the following Saturday at 11:59 P.M. PCA's standard workday is 12:00 A.M. to 11:59 P.M. (midnight) each day.

## OVERTIME

All non-exempt employees are required to obtain approval from their supervisor prior to working overtime or double time. Failure to obtain such approval may subject an employee to discipline, up to and including termination. However, in all cases, the School will compensate its non-exempt employees for all hours worked.

## OFF THE CLOCK WORK

PCA prohibits all non-exempt employees from working off the clock at any time. All time worked must be recorded on the employee's timesheet. This includes the use of laptops, computers, PDAs or cell-phones to check work email, voicemail or to send text messages after hours.

## MEAL AND REST PERIODS (NON-EXEMPT EMPLOYEES)

All non-exempt employees are provided with an opportunity to take meal and rest periods consistent with the law. During your meal periods and rest periods, you may not work at all. You are excused from all duties. In addition, please understand that you may not combine required meal or rest periods in order to take a longer break. Also, you may not miss a required meal or rest period in order to start work later or leave work earlier. In the rare event that you believe you cannot take a meal or rest period, or you are unable to take a full meal or rest period pursuant to School policy or you must begin your meal period more than five hours after your work period began, you must notify Human Resources in advance whenever possible (and, in any event, as soon as possible) so that the proper measures may be taken.

Failure to comply with the School's policy regarding meal and/or rest periods can lead to discipline, up to and including termination.

### Meal Periods

Non-exempt employees (hourly employees) scheduled to work more than five hours in a day are given a 30-minute duty-free unpaid meal period. The meal period must be taken before the end of the fifth (5th) hour of work. For example, if the employee begins working at 7:00 a.m., then the employee must clock out to begin their meal period no later than 11:59 a.m. **The supervisor may schedule the employee's meal periods.** The employee may waive this meal period if their workday will be completed within a total of six hours or less. To waive a meal period, the employee must receive prior written approval from their supervisor and complete a "Meal Period Waiver" form. This needs to be completed in advance or immediately as the situation occurs, but in no event after the meal period has been missed. If you are a part-time employee who consistently works 5-6 hours a day and would like to waive your meal break on a regular basis, please note that you will have to fill out a new form every 90 days to continue to waive your meal break. Reach out to HR to receive a copy of the "Meal Period Waiver" form.

If an employee's day exceeds ten hours of work time, the employee is entitled to an additional 30-minute duty-free meal break. The employee may only waive this second meal period if they have taken the required first meal break of at least 30 minutes and their workday will not exceed 12 hours. To waive the second meal period, the employee must receive prior written approval from their supervisor and

complete a “Second Meal Period Waiver” form.

<u>Hours Worked</u>	<u>Number of Meal Periods</u>
0 hours to 5 hours	No meal period
Over 5 hours to 10 hours	1, 30-minute meal period
Over 10 hours to 14 hours	2, 30-minute meal periods

Non-exempt employees must observe assigned working hours, the time allowed for meal periods, and report any missed, late or short meal periods on that day's time record and to the employee's supervisor immediately. The meal period must be accurately recorded on the employee's timesheet. Meal periods are unpaid time and employees are free to leave the premises. Meal periods may not be combined with rest periods or used to come in later or leave earlier on a workday.

### Rest Periods

Non-exempt employees are authorized and permitted to take a 10-minute rest period for each four (4) hours of work or major portion thereof. Your supervisor may schedule your rest periods. Rest periods should be taken as close to the middle of a work period as possible and cannot be taken in conjunction with a meal period. Rest periods are paid work time; they cannot be waived by the employee in order to shorten the workday or used towards additional time off.

<u>Hours Worked</u>	<u>Number of Rest Periods</u>
3.5 hours to 6 hours	1, 10-minute rest period
Over 6 hours to 10 hours	2, 10-minute rest periods
Over 10 hours to 14 hours	3, 10-minute rest periods

Non-exempt employees must observe assigned working hours, the time allowed for rest periods, and report any missed rest period immediately as set forth below. **The meal period must be accurately recorded on the employee's time sheet. Meal periods are unpaid time and employees are free to leave the premises. Meal periods may not be combined with rest periods or used to come in later or leave earlier on a workday. Non-exempt employees are expected to return to work promptly at the end of any meal period.** Employees are encouraged to report any concerns regarding meal or rest periods to Human Resources.

### Reporting Missed, Late or Short/Interrupted Meal and Rest Periods

In addition to reporting it on their time record, any employee who misses a meal or rest period or who experiences a late, short, or interrupted meal period—for any reason—must immediately report this issue to their supervisor and complete a Non-Exempt Employee Meal Waiver Agreement. The employee must fill out all fields on the form, including providing a thorough explanation for the non-compliant meal or rest period. The employee must complete and turn in this form to their supervisor on the same workday.

they experienced the non-compliant meal or rest period. If an employee voluntarily chooses to miss a meal or rest period or take a late, short, or interrupted meal period (e.g., I chose to take my lunch later in the day or I chose to refuse an “authorized” meal period at the time provided by ), the employee is not entitled to premium pay (one additional hour of pay). If an employee involuntarily experiences a missed meal or rest period or a late, short, or interrupted meal period (e.g., my supervisor 32 asked me to handle a client call or meeting that caused me to miss or take a late meal period), the employee is entitled to premium pay. Employees must report the reason for the noncompliant meal or rest on the Non-Exempt Employee Meal Period Waiver Agreement, or to Human Resources. Non-Exempt Employee Meal Period Waiver Agreement.

## PAYDAYS

Employees are paid semi-monthly on the 10th and 25th of the month in accordance with the School’s payroll schedule. The Payroll Coordinator or designee will distribute checks to those who do not have direct deposit. If a normally scheduled pay day falls on a weekend or holiday, paychecks will be distributed the preceding business day.

A written, signed authorization is required for mail delivery or for delivery of your paycheck to any other person. If you have an automatic deposit for your paycheck, your funds will be deposited to the financial institution you requested by the end of business on the scheduled payday. While an automatic deposit may actually credit to your account before your actual “payday,” the School is not responsible for automatic payments or withdraws dated prior to your actual payday and you should not depend on early deposits of your pay.

If a wage garnishment order is received by PCA for one of our employees, we are obligated by law to comply with the demand. The affected employee will receive notice from their supervisor or Human Resources as soon as possible.

## OVERPAYMENT OF WAGES

If the School determines a wage overpayment has been made to a school employee, the School will notify the employee of the overpayment and afford the employee an opportunity to respond before commencing recoupment actions. Reimbursement shall be made to the School through one of the following methods mutually agreed to by the employee and the School:

- Cash payment or cash installment payments.
- Installment payments through payroll deduction covering at least the same number of pay periods in which the error occurred. When overpayments from the School have occurred for more than one year, the employer may require full repayment from the employee through payroll deductions over the period of one year.
- The adjustment of appropriate leave credits, provided that the overpayment involves the accrual or crediting of leave credits such as vacation leave. Any errors in sick leave balances shall only be adjusted with sick leave credits.

Installment payment amounts deducted from an employee’s salary or wages shall not exceed 25 percent

of the school employee's net disposable earnings for each payroll amount. The deductions shall not result in an employee making less than the minimum wage for that payroll period.

Absent mutual agreement on a method of reimbursement, the School will proceed with recoupment by installment payments as provided in bullet (2) above.

If an employee is separated from employment before full repayment of the overpayment amount owed, the School may deduct an amount sufficient to provide full repayment from any money owed to the employee upon separation. If the amount of money owed to the employee upon separation is insufficient to provide full reimbursement to the School, the School shall have the right to exercise any and all other legal means to recover the additional amount owed.

## PAYROLL WITHHOLDINGS

PCA is required by law to withhold Federal Income Tax, State Income Tax, Social Security (FICA), State Teachers Retirement Service (STRS for eligible credentialed faculty) and State Disability Insurance from each employee's paycheck as outlined below. Additionally, if a garnishment, tax levy, or an order to withhold child support payments should be delivered, PCA must comply with that order within the time allowed by law, and cannot postpone the payroll deduction for any reason. Voluntary deductions, which must be authorized in writing by employees, may include retirement plans, employee portion of insurance premiums, or any other benefit made available to employees.

If an employee believes an error has been made in their pay or deductions, PCA will work in good faith to resolve errors as soon as possible. The employee should notify the Payroll Coordinator or designee of any errors in pay or deductions withheld within seven (7) days from the date paid.

Every deduction from the employee's paycheck is explained on the check voucher/paystub. If the employee does not understand the deduction, they should ask Human Resources to explain it. The employee may change the number of withholding allowances they wish to claim for Federal and/or State Income Tax purposes before any pay period by filling out a new W4 form and submitting it to Human Resources.



## SECTION 6 - CONDITIONS OF EMPLOYMENT

### IMMIGRATION LAW COMPLIANCE

PCA employs only those authorized to work in the United States in compliance with the Immigration and Control Act of 1986. Each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 no later than the first day of work for pay and present original documentation establishing identity and employment eligibility as outlined on the I-9 instruction forms no later than three business days after they begin work. Former employees who are rehired must also complete the form if they have not completed an I-9 with PCA within the past three years or if their previous I-9 is no longer retained or valid.

### CREDENTIAL REQUIREMENTS

If you are a credentialed team member, you must provide evidence of your credential including EL Authorization, official transcripts, and/or test scores prior to your first day of actual work. Failure to provide these documents may delay your ability to begin work.

You are also responsible for keeping required certificates, credentials, and registrations current and in good standing, for paying the costs associated with renewal, and for providing both your Executive Director and the School with verification of renewals. Failure to provide these updated documents to the School may result in suspension without pay until such time as the necessary documentation has been provided.

If a teacher fails to obtain the appropriate credential, or allows a credential, certificate, registration, or required course deadline to expire, or fails recertification, training, or testing, or otherwise fail to maintain the necessary credential for your assignment, the School reserves the right to suspend the teacher without pay until the teacher's credential is cleared, or release the teacher from at-will employment as necessary.

### TUBERCULOSIS TEST

Before the first day of employment, all new employees must have had a tuberculosis test as described in Education Code 49406 or a TB Risk Assessment (pursuant to AB1667) within the past 60 days. Employees transferring from other public or private schools within the State of California must either provide proof of an examination or a completed Risk Assessment within the previous 60 days or a certification showing they were examined within the past four (4) years and was found to be free of communicable tuberculosis. The current physician's statement or Risk Assessment must be on file in the office before the first day of employment. Failure to provide documentation on time may result in delay of your ability to begin work or termination.

TB Clearance is good for four years and it is the employee's responsibility to remain in compliance and ensure the School has a valid certificate on file. As a condition of continued employment, all employees will be required to present evidence once every four (4) calendar years that they are free from active

tuberculosis. Employees shall be required to provide TB clearance to Human Resources no later than the last Friday business day prior to the expiration date of their current TB clearance. Employees whose TB clearance has expired will not be permitted to report to work, and will be placed on unpaid leave in increments of five (5) work days. For example, if an employee's TB clearance expires on Tuesday, March 7, the TB clearance would be due to HR by Friday, March 3. If the employee does not submit the TB clearance to HR by Friday, March 3, the employee will be placed on unpaid leave for March 6-10. Turning in the TB clearance during the 5-day unpaid leave period does not cancel the 5-day unpaid leave period.

## CRIMINAL BACKGROUND CHECK

As required by law, all individuals working or volunteering at the School will be required to submit to fingerprinting and a criminal background investigation.

Applicants and employees with adverse background information (such as certain specific criminal conviction) may be ineligible for employment with the School.

The School shall, on a case-by-case basis, determine whether a volunteer will have more than limited contact with pupils or consider other factors requiring a criminal background check for such a volunteer.

## CHILD ABUSE AND NEGLECT REPORTING ACT

If, within your professional capacity or within the scope of your employment, you observe or gain possession of knowledge that a child has been a victim of child abuse or sexual abuse or neglect, or you reasonably suspect it, California Penal Code Section 11166 requires you to immediately report this information or suspicion to a child protective agency or the police. The report shall be made by phone as soon as possible and a subsequent written report must be sent within 36 hours of your knowledge or suspicion of the abuse. Failure to meet these obligations can result in a monetary fine and/or jail.

While each employee has the responsibility to ensure the reporting of any child they suspect is a victim of abuse, the employee is not to verify the suspicion or prove that abuse has occurred. Teachers or staff who become aware of suspected child abuse should report the suspicions as required.

It is extremely important that PCA's employees comply with the requirements of the Child Abuse and Neglect Reporting Act (CANRA). No mandated reporter can be held civilly or criminally liable for any report required or authorized by CANRA. In addition, any other person who voluntarily reports a known or suspected incident of child abuse or neglect will not incur civil or criminal liability unless it is proven that the report was false and the person knew the report was false or made the report with reckless disregard of its truth or falsity.

Your direct supervisor is available to answer any questions employees may have about their responsibilities under CANRA, or to assist an employee in making a report under CANRA. If an employee makes a report pursuant to CANRA without PCA's assistance, they are required to notify PCA of the report if it is based on incidents they observed or became aware of during the course and scope of their employment with PCA.

All employees that are mandated reporters are required to participate in approved mandated reporter training provided by the School within six weeks of the employee's hire date and annually thereafter within the first six weeks of each school year. If the employee attends an approved mandated reporter training that is not offered by the School using a sign-in sheet confirming participation, the employee is required to provide a copy of any certificate of completion to the human resources department of the School after completion.

## PERSONNEL FILES

An employee or former employee (or designee) has the right to inspect or receive a copy of their personnel records at reasonable times, at a reasonable place, and on reasonable advance notice to Human Resources. All requests should be put in writing preferably on the form maintained by PCA. If the request includes a request for copies the employee or former employee may be required to pay for the actual costs of copying. Employer will respond to such a request within 30 days of receipt of the written request.

Employees are not entitled to inspect or copy: letters of reference, records that relate to an investigation of possible criminal activity, ratings, reports, or records obtained prior to employment, prepared by examination committee members or obtained in connection with a promotional examination.

## CHANGES IN EMPLOYEE INFORMATION

An employee is responsible for notifying Human Resources about changes in the employee's personal information and changes affecting the employee's status (ex. name changes, address or telephone number changes, marriages or divorces, etc.). This notification by the employee must occur as close to the change as possible, but no later than 30 days following the change.

## SECTION 7 – PERFORMANCE

### PERFORMANCE EVALUATIONS

Staff will be evaluated annually or every other year per the Evaluation Policy. Staff will meet with their direct supervisor annually to establish and review **SMART** goals for the school year.

## SECTION 8 – LEAVES

### FAMILY MEDICAL LEAVE ACT

Eligible employees may request a family and medical leave of absence under the circumstances described below. Eligible employees are those who have been employed by the School for at least 12 months (not necessarily consecutive), have worked at least 1250 hours during the 12 months immediately prior to the family and medical leave of absence, and are employed at a worksite where there are 50 or more employees of the School within 75 miles.

Ordinarily, you must request a planned family and medical leave at least 30 days before the leave begins. If the need for the leave is not foreseeable, you must request the leave as soon as possible. You should use the School's request form, which is available upon request from Human Resources. Failure to comply with this requirement may result in a delay of the start of the leave.

A family and medical leave may be taken for the following reasons:

- The birth of an employee's child or the placement of a child with the employee for foster care or adoption, so long as the leave is completed within 12 months of the birth or placement of the child.
- The care of the employee's spouse, child, parent, or registered domestic partner with a "serious health condition."
- The "serious health condition" of the employee.
- The care of the employee's spouse, child, parent, or next of kin who is a member of the Armed Forces, including a member of the National Guard or Reserves, and who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness; or
- Any qualifying exigency as defined by the applicable regulations arising out of the fact that the employee's spouse, child, or parent is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces in support of a contingency operation.

A "serious health condition" is one that requires inpatient care in a hospital or other medical care facility or continuing treatment or supervision by a health care provider. You may take a leave under paragraph (2) above only if due to a serious health condition, your spouse, child, parent, or registered domestic partner requires your care or assistance as certified in writing by the family member's health care provider. If you are seeking a leave under paragraph (3) above, you must provide the School with a medical certification from your health care provider establishing eligibility for the leave, and you must provide the School with a release to return to work from the health care provider before returning to work. You must provide the required medical certification to the School in a timely manner to avoid a delay or denial of leave. You may obtain the appropriate forms from Human Resources.

Family and medical leave is unpaid and may be taken for up to 12 workweeks during the designated 12-month period (with the exception of qualifying leaves to care for a member of the Armed Services who has a serious illness or injury, which may be taken for up to a total of 26 workweeks of leave during a

single 12-month period). The 12-month period will be defined as a “rolling twelve months” looking backward over the preceding 12 months to calculate how much family and medical leave time has been taken and therefore determine the amount of leave that is available. Qualifying leaves to care for a member of the Armed Services who has a serious illness or injury will be calculated on the 12-month period looking forward. All time off that qualifies as family and medical leave will be counted against your state and federal family and medical leave entitlements to the fullest extent permitted by law.

You will be required to use any available PTO during unpaid family and medical leave (e.g., for example, any period in which you are not receiving a wage supplement through the EDD). You will also be required to use any available paid sick leave during unpaid family and medical leave that is due to your own or a family member’s serious health condition. However, if an employee is receiving benefit payments pursuant to a disability insurance plan (such as California’s State Disability Insurance plan or Paid Family Leave program) or workers’ compensation insurance plan, the employee and the School may mutually agree to supplement such benefit payments with available PTO and/or paid sick leave.

Benefit accrual, such as PSL, PTO, and holiday benefits, will be suspended during the approved leave period and will resume upon return to active employment. During a family and medical leave, group health benefits will be maintained as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

If the employee out on leave chooses not to return to work from a leave allowed by this policy after the expiry of the leave, the employee will be required to repay the School the premium amounts it paid during leave, unless the employee does not return to work because of circumstances beyond their control or because of recurrence, continuation, or onset of a serious health condition.

If you do not return to work on the first workday following the expiration of an approved family and medical leave, you will be deemed to have resigned from your employment. Upon returning from such a leave, you will normally be reinstated to your original or an equivalent position and will receive pay and benefits equivalent to those you received prior to the leave, as required by law. In certain circumstances, “key” employees may not be eligible for reinstatement following a family and medical leave. The School will provide written notice to any “key” employee who is not eligible for reinstatement.

Before an employee will be permitted to return from leave taken because of their own serious health condition, the employee must obtain a certification from their health care provider that they are able to resume work.

If you have any questions concerning or would like to submit a request for a family and medical leave of absence, please contact Human Resources. In some instances, FMLA leave and CFRA leave run concurrently and in some instances they do not. FMLA runs concurrently with Pregnancy Disability Leave, while CFRA does not.

## CALIFORNIA FAMILY RIGHTS ACT (“CFRA”)

Employees may be eligible for CFRA leave only if the School has 5 or more employees for each working day during each of the 20 or more calendar workweeks in the current or preceding calendar year. Eligible

employees may request a CFRA leave of absence under the circumstances described below. Eligible employees are those who have been employed by the School for at least 12 months (not necessarily consecutive) and have worked at least 1250 hours during the 12 months immediately prior to the CFRA leave of absence.

Ordinarily, you must request a planned CFRA leave at least 30 days before the leave begins. If the need for the leave is not foreseeable, you must request the leave as soon as practicable. You should use the School's request form, which is available upon request from Human Resources. Failure to comply with this requirement may result in a delay of the start of the leave.

A CFRA leave may be taken for the following reasons:

- The birth of an employee's or a domestic partner's child or the placement of a child with the employee for foster care or adoption, so long as the leave is completed within 12 months of the birth, adoption or placement of the child.
- The care of the employee's spouse, child, registered or domestic partner, domestic partner's child, parent, parent-in-law, grandparent, grandchild, sibling, or designated person with a "serious health condition."
- The "serious health condition" of the employee; or
- The qualifying exigency related to covered active duty or call to covered active duty of an employee's spouse, domestic partner, child, or parent in the Armed Forces of the United States.

The definition of child includes any adult child, regardless of the child's age or dependency status.

The definition of "designated person" includes any individual related by blood or association with the employee that is the equivalent of a family relationship. The designated person may be identified by the employee at the time the employee requests leave. Employees are limited to one designated person per 12-month period for family care and medical leave.

A "serious health condition" is one that requires inpatient care in a hospital or other medical care facility or continuing treatment or supervision by a health care provider. You may take a leave under bullet (2) above only if due to a serious health condition, your spouse, child, registered or domestic partner, domestic partner's child, parent, parent-in-law, grandparent, grandchild, sibling, or designated person requires your care or assistance as certified in writing by the family member's health care provider. If you are seeking a leave under bullet (3) above, you must provide the School with a medical certification from your health care provider establishing eligibility for the leave, and you must provide the School with a release to return to work from the health care provider before returning to work. You must provide the required medical certification to the School in a timely manner to avoid a delay or denial of leave. You may obtain the appropriate forms from Human Resources.

CFRA leave is unpaid and may be taken for up to 12 workweeks during the designated 12-month period. The 12-month period will be defined as a "rolling twelve months" looking backward over the preceding 12 months to calculate how much CFRA leave time has been taken and therefore determine the amount of leave that is available. Qualifying leaves to care for a member of the Armed Services who has a serious illness or injury will be calculated on the 12-month period looking forward. All time off that qualifies as

CFRA will be counted against your state and federal family and medical leave entitlements to the fullest extent permitted by law.

You will be required to use any accrued vacation during unpaid CFRA leave (e.g., for example, any period in which you are not receiving a wage supplement through the EDD). You will also be required to use any accrued paid sick leave during unpaid CFRA leave that is due to your own serious health condition. However, if an employee is receiving benefit payments pursuant to a disability insurance plan (such as California's State Disability Insurance plan or Paid Family Leave program) or workers' compensation insurance plan, the employee and the School may mutually agree to supplement such benefit payments with available PTO and/or paid sick leave.

Benefit accrual, such as PTO, PSL, and holiday benefits, will be suspended during the approved leave period and will resume upon return to active employment. During a CFRA leave, group health benefits will be maintained as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

If the employee out on leave chooses not to return to work from a leave allowed by this policy after the expiry of the leave, the employee will be required to repay the School the premium amounts it paid during leave, unless the employee does not return to work because of circumstances beyond their control or because of recurrence, continuation, or onset of a serious health condition.

If you do not return to work on the first workday following the expiration of an approved CFRA leave, you will be deemed to have resigned from your employment. Upon returning from such a leave, you will normally be reinstated to your original or an equivalent position and will receive pay and benefits equivalent to those you received prior to the leave, as required by law.

Before an employee will be permitted to return from leave taken because of their own serious health condition, the employee must obtain a certification from their health care provider that they are able to resume work.

If you have any questions concerning a CFRA leave, or would like to submit a request for a CFRA leave of absence, please contact Human Resources.

## PREGNANCY DISABILITY LEAVE

The School provides pregnancy disability leaves of absence without pay to eligible employees who are temporarily unable to work due to a disability related to pregnancy, childbirth, or related medical conditions. Employees should make requests for pregnancy disability leave to their supervisor and Human Resources at least 30 days in advance of foreseeable events and as soon as possible for unforeseeable events. A health care provider's statement must be submitted, verifying the need for such leave and its beginning and expected ending dates. Any changes in this information should be promptly reported to Human Resources. Employees returning from pregnancy disability leave must submit a health care provider's verification of their fitness to return to work.

The School will make a good faith effort to provide reasonable accommodations and/or transfer requests



when such a request is medically advisable based on the certification of a health care provider. When an employee's health care provider finds it is medically advisable for an employee to take intermittent leave or leave on a reduced work schedule and such leave is foreseeable based on planned medical treatment because of pregnancy, the School may require the employee to transfer temporarily to an available alternative position. This alternative position will have an equivalent rate of pay and benefits and must better accommodate recurring periods of leave than the employee's regular job.

Eligible employees are normally granted unpaid leave for the period of disability, up to a maximum of four months (or 17 1/3 weeks or 693 hours) per pregnancy. Employees will be required to use any unused allotted sick time during any unpaid portion of pregnancy disability leave (e.g., any period in which you are not receiving a wage supplement through the EDD). Employees may also elect to use any available PTO during any unpaid portion of pregnancy disability leave. If an employee is receiving benefit payments pursuant to a disability insurance plan (such as California's State Disability Insurance plan or Paid Family Leave program), the employee and the School may mutually agree to supplement such benefit payments with available PTO and/or sick leave.

Benefit accrual, such as PTO, sick leave, and holiday benefits, will be suspended during the approved pregnancy disability leave period and will resume upon return to active employment. Group health benefits will be maintained during the approved pregnancy disability leave as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

Additionally, if an employee does not return to work after the expiration of the pregnancy disability leave, and the reasons for failure to return to work do not include one of the following: 1) the employee is on CFRA leave; or 2) the continuation, recurrence or onset of a health condition entitling the employee to pregnancy disability leave in the first instance, non-pregnancy-related medical conditions requiring other leave or other circumstances beyond the control of the employee, the School reserves the right to recover from the employee the premium the School paid for the employee's group health plan coverage while out on leave.

So that an employee's return to work can be properly scheduled, an employee on pregnancy disability leave is requested to provide the School with at least one week's advance notice of the date they intend to return to work.

When an approved pregnancy disability leave ends, the employee will be reinstated to the same position, unless the job ceases to exist because of legitimate business reasons. An employee has no greater right to reinstatement to the same position or to other benefits and conditions of employment than if they had been continuously employed in this position during the pregnancy disability leave or transfer. If the same position is not available, the employee will be offered a comparable position in terms of such issues as pay, location, job content, and promotional opportunities, if one exists. An employee has no greater right to reinstatement to a comparable position or to other benefits or conditions of employment than an employee who has been continuously employed in another position that is being eliminated.

If you have any questions regarding pregnancy disability leave, please contact Human Resources.

## MILITARY SPOUSE LEAVE

An eligible employee-spouse of a qualified service member is entitled to take ten (10) days of unpaid leave during a period when the spouse or domestic partner is on leave from deployment during a period of military conflict.

An eligible employee must work an average of 20 hours per week; must provide notice of their intention to take the leave within two (2) business days of receiving official notice that the service member will be on leave from deployment; and submit written documentation certifying that the service member will be on leave during the time the leave is required.

The employee may use unused and available PSL or PTO for this leave.

## WORKERS' COMPENSATION LEAVE

Employees that are temporarily disabled due to a work-related illness or injury will be placed on workers' compensation leave. The duration leave will depend upon the rate of recovery and the medical provider's recommendation. Workers' compensation leave will run concurrently with any other applicable medical leave of absence (i.e., FMLA/CFRA if applicable). Human Resources will reach out to employees that have requested a workers' compensation leave regarding employer provided health insurance benefits. If you have any questions concerning this leave and/or any benefit related questions, please contact Human Resources.

## BEREAVEMENT LEAVE

PCA provides employees who have been employed by PCA for at least 30 days prior to the commencement of leave up to three (3) days of paid bereavement leave, beyond sick or personal time, due to the death of a family member. PCA provides 2 additional unpaid days of leave due to the death of a family member. If an employee has paid sick leave or personal time, the employee may use that time during the unpaid leave. If the eligible employee travels more than 500 miles for bereavement leave, PCA will provide the 2 additional days of leave with pay. This includes a parent (including an in-law and stepparent), spouse, domestic partner, dependent, sibling, stepsibling, grandparent or grandchild. Bereavement leave may be taken intermittently, but the leave shall be completed within three months of the date of death of the family member. PCA reserves the right, in its sole discretion, to request documentation of the death of the family member, so long as the request is made within 30 days of the first day of leave.

## JURY DUTY LEAVE

All employees who receive a notice of jury/witness duty must notify their supervisor as soon as possible so that arrangements may be made to cover the absence. In addition, employees must provide a copy of the official jury/witness duty notice to their supervisor. Employees must report for work whenever the court schedule permits. Either the School or the employee may request an excuse from jury/witness duty if, in the School's judgment, the employee's absence would create serious operational difficulties.

Non-exempt employees who are called for jury/witness duty will be provided time off without pay.

Exempt employees will receive their regular salary unless they do not work any hours during the course of a workweek. **Eligible** employees may elect to use any available PTO during jury/witness duty leave.

In the event that the employee must serve as a witness within the course and scope of their employment with the School, the School will provide time off with pay.

## TIME OFF TO VOTE

The School will allow any non-exempt employee who is a registered voter and does not have enough time outside of working hours to vote in a statewide election up to two (2) hours of work time without loss of pay to vote. The request must be made at least two (2) working days in advance. The time must be at the beginning or end of the employee's regular shift, whichever provides the least disruption to the normal work schedule unless the School and the employee agree otherwise. The employee may be required to prove they are a registered voter.

An employee may also serve as an election official on Election Day without being disciplined, however the School will not pay the employee for this time off. Available PTO may be used for this time off.

## SCHOOL ACTIVITIES LEAVE

The School encourages employees to participate in the school activities of their child(ren). If you are the parent or guardian of a child who is in school up to grade 12, or who attends a licensed daycare facility, you may take up to 40 hours of unpaid leave per year to participate in the activities of the school or daycare facility, to find, enroll or reenroll your child in a school or with a licensed childcare provider and/or to address a childcare provider or school emergency.

The leave is subject to all of the following conditions:

- The time off for school activity participation cannot exceed eight (8) hours in any calendar month, or a total of forty (40) hours each year.
- Unless it is an emergency, employees planning to take time off for school visitations must provide as much advance notice as possible to their supervisor.
- If the School employs both parents, the first employee to request such leave will receive the time off. The other parent will receive the time off only if the leave is approved by their supervisor.
- Employees must use existing PTO in order to receive compensation for this time off.
- Employees who do not have paid time off available will take the time off without pay.
- Documentation of participation may be requested and will be sufficient if it is provided in writing by the school or the licensed childcare/day care facility.

## SCHOOL APPEARANCE/SUSPENSION LEAVE

If the parent or guardian of a child facing suspension from school is summoned to the school to discuss the matter, the employee should alert their supervisor as soon as possible before leaving work. In compliance with California Labor Code section 230.7, no discriminatory action will be taken against an

employee for taking time off for this purpose. To be eligible for time off to attend a child's school, the employee must be the parent of a child in kindergarten or in grades 1-12 and must present the school's communication, which requests the employee's appearance at the school, to their supervisor at least two days before the requested time off.

This leave is unpaid but the employee may choose to use available PTO. You will not be discharged or discriminated against because of an absence protected by this law.

## CRIME VICTIM LEAVE

Employees are allowed to be absent from work for various reasons related to crime or abuse if:

- The employee is a victim of such a crime.
- An immediate family member (i.e., spouse, registered domestic partner, child, step-child, adoptive child, foster child, legal ward of the court, adopted child, a child of a domestic partner, a child to whom the employee stands in loco parentis, a person to whom the employee stood in loco parentis when the person was a minor, sibling, step-sibling, foster sibling, adoptive sibling, half-sibling, parent, legal guardian of an employee or an employee's spouse or domestic partner, person who stood in loco parentis when the employee or employee's spouse or domestic partner was a minor child, step-parent, or the child or a registered domestic partner, or any other individual whose close association with the employee is the equivalent of any of these family relationships) of an employee is a victim of such a crime.

"Victim" means a victim of stalking, domestic violence, or sexual assault; a victim of crime that caused physical injury or that caused mental injury and a direct threat of physical injury; a person whose immediate family member is deceased as the direct result of crime.

Leave may be taken for the following reasons:

- Any employee may take leave to appear in court to comply with a subpoena or other court order as a witness in any judicial proceeding.
- An employee victim may take time off to obtain or attempting to obtain any relief, which includes, but is not limited to, a temporary restraining order, restraining order, or other injunctive relief, to help ensure the health, safety, or welfare of the victim or their child.
- An employee victim to seek medical attention for injuries caused by crime or abuse.
- An employee victim to obtain services from a domestic violence shelter, program, rape crisis center, or victim services organization or agency as a result of the crime or abuse.
- An employee victim to obtain psychological counseling or mental health services related to an experience of crime or abuse.
- An employee victim to participate in safety planning and take other actions to increase safety from future crime or abuse, including temporary or permanent relocation.

When an employee is a victim as defined as follows: A person against whom one of the following crimes has been committed: A violent felony as defined in Penal Code section 667.5(c); A serious felony as

defined in Penal Code section 1192.7(c); A felony provision of law proscribing theft or embezzlement, the employee shall be allowed to attend judicial proceedings related to that crime or those crimes against an immediate family member victim, a registered domestic partner of a victim, or the child of a registered domestic partner of a victim.

When an unscheduled absence occurs, the School shall not take any action against the employee if the employee, within a reasonable time after the absence, provides a certification to the employer. Documentation may be from any of the following:

- A police report indicating that the employee was a victim.
- A court order protecting or separating the employee from the perpetrator of the crime or abuse, or other evidence from the court or prosecuting attorney that the employee has appeared in court.
- Documentation from a licensed medical professional, domestic violence counselor, a sexual assault counselor, victim advocate, licensed health care provider, or counselor that the employee was undergoing treatment or receiving services for physical or mental injuries or abuse resulting in victimization from the crime or abuse; or
- Any other form of documentation that reasonably verifies that the crime or abuse occurred, including but not limited to, a written statement signed by the employee, or an individual acting on the employee's behalf, certifying that the absence is for a purpose authorized by this Crime Victim Leave.

An employee must give reasonable advance notice to the School by providing documentation of the proceeding, unless advanced notice is not feasible.

This leave is unpaid but the employee may choose to use available sick, or personal time off (PTO). You will not be discharged or discriminated against because of an absence protected by this law.

The School will also, to the extent possible and allowed by law, maintain the confidentiality of an employee requesting leave under this provision.

## DOMESTIC VIOLENCE LEAVE/SEXUAL ASSAULT/STALKING LEAVE

If you are the victim of domestic violence, sexual assault, or stalking, you may be entitled to a reasonable accommodation for your safety while at work. Reasonable accommodations may include the implementation of safety measures, including a transfer, reassignment, modified schedule, changed work telephone changed work station, installed lock, assistance in documenting domestic violence, sexual assault, stalking, or other crime that occurs in the workplace, an implemented safety procedure, or another adjustment to a job structure, workplace facility, or work requirement in response to domestic violence, sexual assault, stalking, or other crime, or referral to a victim assistance organization. The School is not required to undertake an action that constitutes an undue hardship on its business operations. If you require a reasonable accommodation in line with this policy, please contact the School's human resources manager.

You will not be discharged, discriminated against, or retaliated against because of a request for an

accommodation under this policy.

If any employee believes they have experienced retaliation or discrimination as a result of conduct protected by this policy, the employee may file a complaint with their supervisor and/or the Labor Commissioner's Office. For more information, contact the Labor Commissioner's Office by phone at (213) 897-6595 or visit a local office by finding the nearest one on the website: [www.dir.ca.gov/dlse/DistrictOffices.htm](http://www.dir.ca.gov/dlse/DistrictOffices.htm). The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

## MILITARY LEAVE

California's military leave laws, and the Uniformed Services Employment and Reemployment Rights Act ("USERRA") ensure that employees are not adversely affected in their employment after taking leave for military service. Employees who serve in the military and are entitled to a military leave of absence without pay from the School under applicable laws should notify Human Resources regarding the need for military leave.

Please see Human Resources for more information regarding job reinstatement rights upon completion of military service.

## ADULT LITERACY LEAVE

Pursuant to California law, the School will reasonably accommodate any eligible employee who seeks to enroll in an adult literacy education program, provided that the accommodation does not impose an undue hardship on the School. The School does not provide paid time off for participation in an adult literacy education. However, you may utilize available PTO if you want compensation for this time off. If you do not have any PTO available, you will be permitted to take the time off without pay.

## ORGAN DONOR / BONE MARROW DONOR LEAVE

The School will provide up to five business days of paid leave within a one-year period to an employee who donates bone marrow to another person. In addition, the School will provide up to 30 business days of paid leave within a one-year period and up to another 30 business days of unpaid leave within a one-year period to an employee who donates an organ to another person. The one-year period is measured from the date the employee's leave begins and shall consist of 12 consecutive months.

You must give as much notice as is practicable and must provide certification of the medical necessity of the procedure. You will be required to use up to ten (10) days of any available paid leave (sick and/or PTO) for organ donation and up to five (5) days of available paid leave (sick and/or PTO) for bone marrow donation. This leave does not run concurrently with FMLA/CFRA. You must have been employed for at least a 90-day period immediately preceding the beginning of the leave, if otherwise eligible.

The employee will also be given an additional unpaid leave of absence, not exceeding 30 business days in a one-year period, when that employee is an organ donor, for the purpose of donating the employee's organ to another person. The one-year period is measured from the date the employee's leave begins and

shall consist of 12 consecutive months.

You may take this leave incrementally, as medically necessary, or all at one time. All health benefits shall be maintained during this leave to the extent they exist at the time of the leave. This leave shall not be considered a break in service and the employee shall continue to receive paid time off and other benefits as if they had continued working. The Employee shall be required to pay any portion of their benefits they are currently paying.

An employee shall not have any greater rights during this leave than if they had been actively working during this time, but will be reinstated to their same or equivalent job prior to the leave. No employee shall be discriminated or retaliated against for taking an organ donation or bone marrow leave.

## DRUG & ALCOHOL REHABILITATION LEAVE

PCA will reasonably accommodate any employee who volunteers to enter an alcohol or drug rehabilitation program, if the reasonable accommodation does not impose an undue hardship on the School. Reasonable accommodation includes time off without pay and adjusting work hours. You may use allotted and unused sick leave. All reasonable measures to safeguard your privacy will be maintained.

This policy in no way restricts PCA's right to discipline an employee, up to and including termination of employment, for violation of PCA's Substance and Alcohol Policy.

## VOLUNTEER CIVIL SERVICE LEAVE/TRAINING

In California, no employee shall receive discipline for taking time off to perform emergency duty/training as a volunteer firefighter, reserve peace officer, or emergency rescue personnel. If you are participating in this kind of emergency duty/training, please alert your supervisor so they may be aware of the fact that you may have to take unpaid time off for emergency duty/training. In the event that you need to take time off for emergency duty/training, please alert your supervisor before doing so whenever possible. Time off for emergency training may not exceed 14 days per calendar year.

Emergency Duty/Training Leave is unpaid. You may choose to use your available sick, and/or PTO if you wish to receive compensation for this time off, but you are not required to do so.

If you feel you have been treated unfairly as a result of taking or requesting Emergency Duty/Training Leave, you should contact your supervisor or any other manager, as appropriate.

## CIVIL AIR PATROL LEAVE

PCA provides eligible employees who are volunteer members of the California Wing of the Civil Air Patrol and are called to emergency operational missions up to (10) days of unpaid leave per calendar year. Leave for a single emergency operational mission will generally be limited to three days unless an extension is granted by appropriate government entities and approved by the School.

To be eligible, employees must have been employed with PCA for 90 days immediately preceding the



commencement of leave. Additionally, the School may require certification from the proper Civil Air Patrol authority to verify the eligibility of the employee for the leave requested or taken.

Employees are required to give the School as much notice as possible of the intended dates upon which the leave would begin and end. The School will restore the employee to the position they held when the leave began or to a position with equivalent seniority status, employee benefits, pay, and other terms and conditions of employment, unless the employee is not restored because of conditions unrelated to the exercise of the leave rights by the employee. The time off is unpaid. However, an employee may utilize accrued PTO.

## STAFF OUT OF STATE/COUNTRY

Non-Teaching staff will be allowed to live outside the State of California, but within the United States of America, with the express written prior permission of Pacific Coast Academy. Teaching staff need to live in areas where students are served unless granted prior permission.

In order for Pacific Coast Academy to grant permission, the employee will be required to continue to attend all in person meetings. This includes but is not limited to student meetings, staff meetings, school events, required field trips, testing etc. (once in person meetings are allowed by state and local health departments).

Any travel from the employee's residence to Pacific Coast Academy's office in Poway, California is considered to be commute time and will not be reimbursed by Pacific Coast Academy since the employee's place of residence is the employee's choice and for the employee's sole benefit.

The employee will be required to check in at the Poway, California office on any day where the employee attends in person meetings (student meetings, staff meetings, school events, required field trips, testing, etc.) Any missed in person meeting will need to be taken as sick/ vacation or unpaid leave.

Employees are not allowed to perform any work for Pacific Coast Academy while the employee is located outside of the United States of America. Any time taken outside of the United States of America will be taken as sick/ vacation leave or unpaid time off, but sick leave may not be used for time taken outside of the United States of America.

Any dispute arising out of the employment context between Pacific Coast Academy and the employee will be filed in a court of competent jurisdiction located in San Diego County or with an arbitrator in accordance with an arbitration agreement located in San Diego County and in accordance with the laws of the state of California without regard to conflict of laws principles.



## SECTION 9 – BENEFITS

### SCHOOL HOLIDAYS

The School observes the following holidays during the year:

- Independence Break
- Labor Day
- Veteran's Day
- Thanksgiving Break
- Winter Break
- Martin Luther King Day
- Presidents' Break
- Spring Break
- Memorial Day
- Juneteenth

To be eligible for holiday pay, an employee must be full-time and non-exempt and must work both the business day before and after the holiday. Part-time employees, temporary employees, exempt employees (including, but not limited to teachers) are not eligible for holiday pay. Exempt employees and teachers will receive their regularly scheduled pay during holidays.

Eligible employees will receive time off with pay at their regular rate of pay on the School-observed holidays listed above. When a holiday falls on a Saturday or Sunday, it is usually observed on the preceding Friday or following Monday. However, the School may close on another day. Holiday observance will be announced in advance. The School reserves the right to change this policy at any time, with or without notice.

Holiday hours do not count as hours worked for purposes of calculating overtime. For example, if you receive 8 hours of holiday pay on Monday and work 40 hours Tuesday-Saturday (8 hours/day), you will not be eligible for overtime.

Recognized religious holidays may be taken off by an employee whose religion requires observance of the particular day. Employees must request the day off in advance by written notice to their supervisor. The employee may use paid time off (PTO) if the employee has unused PTO available, otherwise the holiday will be unpaid. All steps will be taken to reasonably accommodate a religious holiday (or practice) absent an undue hardship.

To qualify for holiday pay, all employees must work the last scheduled day before and the first scheduled day after the holiday unless the employee is absent:

- At the Supervisor's request/approval
- Due to closure of schools because of inclement weather
- Due sickness with a doctor's note verifying need for absence
- Prior to or following Jury Duty or Bereavement Leave
- Due to a previously scheduled and approved paid time off

## PAID TIME OFF (PTO)

Full-time 12 month classified employees and certificated directors, and administrators are entitled to paid time off (PTO) according to this policy. PTO days may be used for vacation, personal time, illness, or time off to care for family or dependents. All other employees, including teachers, temporary employees, part-time employees are not eligible to receive or accumulate PTO.

PTO must be scheduled at least five (5) days in advance and approved by your supervisor, except in the case of an illness or emergency. In the case of illness or emergency you are required to contact your immediate supervisor at least one (1) hour before your shift begins, if possible or otherwise as soon as practicable. Employees using extended PTO time (in excess of three (3) days) must submit a request at least two (2) weeks before the extended PTO or, if used as sick time, the employee may be required to submit a doctor's release upon return to work. Your supervisor uses their discretion to approve PTO without advance notice.

Unless used for illness related purposes, PTO may not be taken the last week of the school year, or on scheduled in-service and/or training days, testing administration day, or immediately before or after holidays without supervisor's permission.

Full-time, regular Administrative/Classified employees (12-month employees) accrue ten (10) paid vacation days per year. Vacation days are accrued at a rate of 6.667 hours) per month. Once an employee's PTO balance reaches twenty (20) days (i.e., 160 hours), the employee stops receiving any additional PTO until PTO is used and the employee's balance falls below the 20-day cap. PTO days will not accumulate during any unpaid leave of absence.

The following terms also apply to PTO:

- For both non-exempt and exempt employees, vacation time may be taken in minimum increments of .25 hours. If an exempt employee absents themselves from work for part or all of a workday, they will be required to use available PTO to make up for the absence.
- In the event ~~an~~ a non-exempt employee has exhausted their PTO, any additional time off must be approved by their supervisor and will be taken without pay.

In the event an exempt employee requests to take an entire day off but does not have enough PTO to cover the entire time off, the time off must be approved by their supervisor and the entire day will be taken without pay. However, if the exempt employee works part of the day and has enough PTO to cover the remaining portion of the day, they will receive pay for the entire day.

- Any employee who misses three (3) consecutive days of work without notice to their supervisor may be deemed to have abandoned their job and voluntarily resigned from employment.
- Any employee who converts from full-time to part-time status (less than 35 hours/week) will no longer be eligible for PTO. All accrued PTO will be paid out on the paycheck following the conversion.
- Upon separation of employment, eligible employees will be paid their accrued, but unused PTO based on their date of separation and their regular rate of pay. Employees are not entitled to pay in lieu of taking vacation except upon termination of employment.
- To the extent permitted by law, PTO accumulated prior to the start of a requested and approved unpaid leave of absence must be used to cover hours missed before the start of the unpaid leave.

As with all of its policies and procedures, the School reserves the right to modify, alter, or otherwise eradicate this policy at its sole and absolute discretion to the extent allowed by law.

## SICK LEAVE

The School enacted this policy in accordance with the California Healthy Workplaces, Healthy Families Act to provide paid sick leave ("PSL") to eligible employees.

### Eligible Employees

All employees (including teachers, part-time and temporary employees) who work for the School more than 30 days within a year in California are eligible to accrue PSL beginning on the first day of employment under the accrual rate and cap as set forth in this policy.

### Limits on Use

Eligible employees may use PSL beginning on the 90th day of employment.

PSL may be taken in minimum increments of 2 hours. If an exempt employee absents themselves from work for part or all of a workday for a reason covered by this policy, they will be required to use PSL to make up for the absence.

### Permitted Use

Eligible employees may use their allotted PSL as follows:

- To take paid time off for the diagnosis, care, or treatment of an existing health condition of (or preventive care for) the employee, the employee's family member or a designated person.
- To aid or care for a guide dog, signal dog, or service dog, as those terms are defined by Civil Code section 54.1, of the employee, employee's family member, or the person designated by the employee as identified below.
- If the employee's place of business is closed by order of a public official due to a public health emergency, or the employee is providing care or assistance to a child, whose school or childcare provider is closed by order of a public official due to a public health emergency.
- For purposes related to donating the employee's bone marrow or an organ of the employee to

another person or to care for or assist a person for purposes related to that person's donating bone marrow or an organ to another person.

- For family emergencies, employees may use up to 2 sick leave days per school year.

For purposes of this policy, "family member" means a child, parent, spouse, registered domestic partner, grandparent, grandchild, sibling, a designated person, the child or parent of a spouse of the employee or those related to the employee by blood or affinity equivalent to a family relationship. "Child" means a biological child, a foster child, an adopted child, a stepchild, a child of a registered domestic partner, a legal ward, or a child of a person standing in loco parentis. "Parent" means a biological, foster, or adoptive parent, a stepparent, or a legal guardian of the employee or the employee's spouse or registered domestic partner or a person who stood in loco parentis when the employee was a minor child. "Spouse" means a legal spouse as defined by California law. "Designated person" means a person identified by the employee at the time the employee requests paid sick days. The employee may only designate one person per 12-month period for sick days.

Employees may also use their PSL to take time off from work for reasons related to domestic violence, stalking, or sexual assault.

### Accrual

PSL days are accrued as set forth below to eligible employees:

All employees that have worked within California for 30 days are eligible employees that will be awarded PSL beginning on their first day of employment in accordance with the details below:

Workdays per Position	Start Date			
	7/1/22-9/6/22	9/7/22-12/31/22	1/1/23-3/3/23	3/4/23-6/30/23
191, 196, & PT Staff	24 hours	prorated	24 hours	prorated
201 & 206	32 hours	prorated	32 hours	prorated
228	40 hours	prorated	40 hours	prorated

Workdays per Position	Start Date									
	7/1-8/31	9/1-9/30	10/1-10/31	11/1-11/30	12/1-12/31	1/1-2/28 or 29	3/1-3/31	4/1-4/30	5/1-5/31	6/1-6/30
191, 196, & PT Staff	24	18	12	6	3	24	18	12	6	3
201 & 206	32	24	16	8	4	32	24	16	8	4
228	40	30	20	10	5	40	30	20	10	5

NOTE: Prorated amounts are determined by the percentage available to work during the remainder of the semester.

### Carry Over and Caps on Accrual

The maximum amount of PSL that an employee may accrue is 80 hours for the school year. Carry over into the next year is subject to a cap of 18 days or 144 hours for full time employees. An employee will be awarded the number of hours from the above chart at the start of each semester based on their time of service unless they have already met the cap of 144 hours. Once the maximum accrual is reached, employees stop accruing until the next semester frontload and the amount of accrued sick leave is below 144 hours. Accrued and unused sick leave carries over from year to year, subject to the 144 hour accrual cap. At no time may an employee accrue more than 144 hours. Part time employees will be capped at 80 hours.

### Notification

The employee must provide reasonable advance notification, orally or in writing, of the need to use PSL, if foreseeable. If the need to use PSL is not foreseeable, the employee must provide notice as soon as practicable. In the event that three (3) or more consecutive work days of sick leave are used, an employee must provide medical clearance to return to work.

### Termination

Employees will not receive pay in lieu of unused PSL. Unused PSL will not be paid out upon termination.

### No Discrimination or Retaliation

The School prohibits discrimination or retaliation against employees for using their PSL.

## COBRA BENEFITS

The Federal Consolidated Budget Reconciliation Act (COBRA) gives employees and their qualified beneficiaries the opportunity to continue health insurance coverage under PCA's health plan when a "qualifying event" would normally result in the loss of eligibility.

Some common qualifying events are resignation, termination of employment, or death of an employee, a reduction in an employee's hours or leave of absence, divorce or legal separation, and a dependent child no longer meeting eligibility requirements.

Under COBRA, the employee or beneficiary pays the full cost of coverage at PCA group rates plus an administration fee. PCA or our carrier provides each eligible employee with a written notice describing rights granted under COBRA when the employee becomes eligible for coverage under PCA's health insurance plan. The notice contains important information about the employee's rights and obligations.

## SOCIAL SECURITY/MEDICARE

If you are a full-time regular employee contributing to a teacher's retirement system (PERS/STRS), your

earnings from this job are not covered under Social Security. When you retire, or if you become disabled, you may receive a pension based on earnings from this job. If you do, and you are also entitled to a benefit from Social Security based on either your own work or the work of your spouse, or former spouse, your pension may affect the amount of the Social Security benefit you receive. Your Medicare benefits, however, will not be affected.

PCA withholds income tax from all employees' earnings and, if elected, participates in FICA (Social Security), for temporary employees and Medicare withholding and matching programs as required by law.

## PENSION2 403(B) AND 457(B)

Pension2 is available to all staff members, certificated and classified. Pension2 offers voluntary supplemental savings plans including 403(b) and 457(b) plans with low costs and flexible investment options. The 403(b) plan includes an employer match - 100% of your contributions are matched, up to 5% of your annual BASE contract salary.

If you would like to learn more and enroll in Pension2, South Support Site Pension2 403(b) and 457(b) informational videos provide an overview of what is available and how to enroll. For more information contact Pension2 customer service: (888) 394-2060.

Employer matches are subject to changes, as approved by the Board.

## STATE DISABILITY INSURANCE (WAGE SUPPLEMENT)

All employees are enrolled in California State Disability Insurance (SDI), which is a partial wage replacement insurance plan for California workers. Employees may be eligible for SDI when they are ill or have non-work related injuries, or may be eligible for work related injuries if they are receiving workers' compensation at a weekly rate less than the SDI rate. Specific rules and regulations relating to SDI eligibility are available from Human Resources.

## PAID FAMILY LEAVE (WAGE SUPPLEMENT)

Under California law, eligible employees may participate in the Paid Family Leave ("PFL") program, which is part of the state's unemployment compensation disability insurance program. The PFL program provides up to eight weeks of partial wage replacement benefits to employees who take time off to care for a seriously ill or injured child, spouse, parent, registered domestic partner, siblings, grandparents, grandchildren, or parents-in-law or to bond with a new child (birth, foster care, adoption) or participate in a qualifying event because of a family member's military deployment to a foreign country. The PFL program does not provide job protection or reinstatement rights. It is a wage supplement provided by the state concurrently while an employee takes an eligible leave of absence under PCA policy and applicable law.

PCA will require you to exhaust any available sick leave and PTO prior to your receipt of benefits under the PFL program.

The program will be administered in a manner consistent with California law. For more information regarding this program, you may contact the California Employment Development Department.

## WORKER'S COMPENSATION INSURANCE

Eligible employees are entitled to workers' compensation insurance benefits when suffering from an occupational illness or injury. This benefit is provided at no cost to the employee.

In the event of an occupational injury or illness (as defined under Workers' Compensation Law) an employee may be covered by workers' compensation insurance instead of group insurance.

If an employee should become injured or in any way disabled on the job, they must report the injury immediately to their supervisor. It is a felony to file a fraudulent or false workers' compensation claim.

## RETURN-TO-WORK POLICY

PCA strives to assist employees to return to work at the earliest possible date following an injury or illness. A return-to-work program has several benefits for both the School and employees by minimizing time lost from work.

This policy is not intended to supersede or modify the procedures applicable to employees eligible for reasonable accommodation under the Americans with Disabilities Act (ADA) or leave benefits under the Family and Medical Leave Act (FMLA) or California Family Rights Act (CFRA). Inquiries about the ADA, FMLA or CFRA should be directed to the human resource department (HR).

PCA defines "transitional work" as temporary, modified work assignments within the worker's physical abilities, knowledge and skills.

When possible, transitional positions may be made available to qualified employees to minimize or eliminate time lost from work. The School cannot guarantee a transitional position and is under no obligation to offer, create or encumber any specific position for purposes of offering placement to such a position.

### Procedures

If a health care provider releases the employee to return to work on modified duty and has completed the return-to-work and job description forms, the employee should return the forms to HR within 24 hours or as soon as practicable. The employee cannot return to work without the release from the health care provider.

HR will review the return-to-work form and determine a transitional position for the employee if appropriate and transitional work falls within the School's operational needs. A transitional position job description, including physical requirements, will be prepared for review and approval by the employee's health care provider.

Transitional positions are developed based on the physical capability of the worker, the needs of the

School, and the availability of transitional work. PCA will determine appropriate work hours, shifts, duration and locations of all work assignments. The School reserves the right to determine the availability, appropriateness and continuation of all transitional work assignments.

It is the responsibility of the employee to provide HR with a current telephone number and address, so the employee may be contacted. The employee must notify HR immediately of any and all changes in medical conditions.

It is the responsibility of the employee and the employee's supervisor to notify HR immediately of any work-related injuries, if the employee misses time from transitional work or of any changes to transitional work assignments.

The employee will be asked to sign the notice indicating their acceptance or refusal of the transitional work job offer and to return the notice to HR.

Any employee returning to a transitional position must not exceed the duties of the position or go beyond the restrictions indicated by the health care provider. If any medical restrictions change, the employee must immediately notify their supervisor and provide the supervisor a copy of the new medical release.

Supervisors will monitor work performance to ensure the employee does not exceed the requirements set by the health care provider.

## UNPAID LEAVE

When an exempt salaried employee does not have any available PTO or PSL and there is a need for time off, they must take the whole day unpaid. Exempt salaried staff members cannot take partial days off as unpaid leave.



## SECTION 10 – EMPLOYEE COMMUNICATIONS POLICY

### COMMUNICATIONS POLICY

Every employee is responsible for using PCA's computer system, including, without limitation, its computers, laptops, iPads, tablets, cellular phones, electronic mail (Email) system, telephone, video conferencing, voicemail, facsimile systems and the internet ("Communications Systems"), properly and in accordance with this policy. Any questions about this policy should be addressed to the employee's immediate supervisor.

The school has provided each staff member with a laptop for the purpose of performing all school related functions. It is required that all staff use school issued laptops and refrain from using personal computers for school business, unless staff receives prior written permission from their supervisor to use a personal computer for a limited period of time.

The school and technology department utilize best practices for securing and maintaining laptops. The efforts and systems used are in place to:

- Create a secure, reliable and safe computing environment
- Prevent data loss, including Personally Identifiable Information (PII), confidential or proprietary information
- Have data and management safeguards in place in the case of lost or stolen laptops
- Reduce overall risk of identity theft, work stoppage, data loss/ransoms, etc. and maintain compliance with Cybersecurity Insurance policies

School staff:

- SHOULD NOT use a personal computer/laptop to perform regular work duties
- SHOULD NOT store any PII, confidential or proprietary information to a personal device

The school acknowledges that using email and viewing/editing documents via a personal computer/laptop may occur and is allowed only in limited circumstances with prior written permission.

The school and technology department require that all staff implement MFA (multi factor authentication) wherever possible and require that any instance of a lost personal device that has ever accessed your school email/Drive/systems be reported to the technology department and your supervisor immediately so your passwords can be reset and accounts secured, especially critical in the case of saved passwords on a personal device.

Failure to adhere to this policy may result in discipline, up to and including potential termination.

The Communication Systems are the property of PCA and have been provided for use in conducting PCA business. All communications and information transmitted by, received from, created, or stored in PCA's Communication Systems are records and property of PCA. The Communication Systems are to be used for School purposes only. Employees may, however, use PCA technology resources for the following

incidental personal uses so long as such use does not interfere with the employee's duties, is not done for pecuniary gain, does not conflict with PCA business, and does not violate any PCA policies:

- To send and receive necessary and occasional personal communications.
- To use the telephone system for brief and necessary personal calls; and
- To access the internet for brief personal searches and inquiries during meal periods or other breaks, or outside of work hours, provided employees adhere to all other usage policies.

### No Expectation of Privacy

PCA has the right, but not the duty, to monitor any and all of the aspects of its Communication Systems, including, without limitation, reviewing documents created and stored on its Communication Systems, deleting any matter stored in its system (including, without limitation, its Email and word processing systems), monitoring sites visited by employees on the internet, monitoring chat and news groups, reviewing material downloaded or uploaded by users to the internet, and reviewing Email, voicemails, and instant messages sent and received by users. Further, PCA may exercise its right to monitor its Communications Systems for any reason and without the permission of any employee. Employee use of PCA's Communication Systems constitutes consent to all the terms and conditions of this policy.

Even if employees use a password to access the Communication Systems (or any aspect thereof), the confidentiality of any message stored in, created, received, or sent from PCA's Communication Systems is not assured. Use of passwords or other security measures does not in any way diminish PCA's right to monitor and access materials on its Communication Systems, or create any privacy rights of employees in the messages and files on the system. Any password used by employees must be revealed PCA upon request for any reason that PCA, in its discretion, deems appropriate. Further, employees should be aware that deletion of any Email messages, voicemails or files would not truly eliminate the messages from the system. All Email messages, voicemails and other files may be stored on a central back-up system in the normal course of data management.

Employees have no expectation of privacy in anything they view, create, store, send, or receive on the Communication Systems.

Notwithstanding the foregoing, even though PCA has the right to retrieve, read, and delete any information viewed, created, sent, received, or stored on its Communication Systems, Email messages should still be treated as confidential by other employees and accessed only by the intended recipient. Employees are not authorized to retrieve or read any Email messages that are not sent to them or by them. Any exception to this policy must receive the prior approval of the Executive Director.

### Professional Use of Communication Systems Required

Employees are reminded to be courteous to other users of the system and always to conduct themselves in a professional manner. Emails and other text communications, in particular, are sometimes misdirected or forwarded and may be viewed by persons other than the intended recipient. Users should write Email communications with no less care, judgment, and responsibility than they would use for letters or internal memoranda written on PCA letterhead.

## Offensive and Inappropriate Material

PCA's policy against discrimination and harassment, sexual or otherwise, applies fully to PCA's Communication Systems, and any violation of that policy is grounds for discipline up to and including discharge. Therefore, no Email messages should be created, sent, or received if they contain intimidating, hostile, or offensive material concerning race, color, religion, sex, age, national origin, disability or any other characteristic protected by law. Further, material that is fraudulent, harassing, abusive, embarrassing, sexually explicit, profane, obscene, intimidating, defamatory, unlawful, inappropriate, or offensive (including offensive material concerning sex, race, color, national origin, religion, age, disability, or any other characteristic protected by law) may not be downloaded from the internet or displayed or stored in PCA's computers. Likewise, material or graphics political in nature are not allowed to be used or displayed during work hours. Employees encountering or receiving this kind of material should immediately report the incident to their Executive Director.

PCA may (but is not required) to use software to identify inappropriate or sexually explicit internet sites. Such sites may be blocked from access by PCA networks. Employees who encounter inappropriate or sexually explicit material while browsing on the internet should immediately disconnect from the site, regardless of whether the site was subject to PCA's blocking software.

## Licenses and Fees

Employees may not agree to a license or download any material over the internet for which a registration fee is charged without first obtaining the express written permission of the Executive Director.

## Games and Entertainment Software

Employees may not use a PCA internet connection to download games or other entertainment software, or to play games over the internet.

## Confidential Information

Employees may not transmit information over the internet or through email that is confidential or proprietary. Employees are referred to PCA's "Confidential Information" policy, contained herein, for a general description of what PCA deems confidential or proprietary. When in doubt, employees must consult their immediate supervisor and obtain approval before transmitting any information that may be considered confidential or proprietary.

## Copyrights and Trademarks

PCA's Communication Systems may not be used to send (upload) or receive (download) copyrighted materials, trade secrets, proprietary financial information, or similar materials without prior authorization from the Executive Director. Employees, if uncertain about whether certain information is copyrighted, proprietary, or otherwise inappropriate for transfer, should resolve all doubts in favor of not transferring the information and consult a supervisor.

Any PCA approved material that is posted or sent via its computer system should contain all proper copyright and trademark notices. Absent prior approval from a supervisor to act as an official representative of PCA, employees posting information must include a disclaimer in that information

stating, “Views expressed by the author do not necessarily represent those of PCA.”

### Maintenance and Security of the System

Employees must not deliberately perform acts that waste resources or unfairly monopolize resources to the exclusion of others. These acts include, but are not limited to, sending mass mailings or chain letters, spending excessive amounts of time on the internet, playing games, streaming video or audio files, engaging in online chat groups, printing excessive copies of documents, or otherwise creating unnecessary network traffic. Because audio, video, and picture files require significant storage space, files of this or any other sort may not be downloaded unless they are business-related. In addition, employees should routinely delete outdated or otherwise unnecessary voicemails, Emails and computer files. These deletions will help keep the system running smoothly and effectively, as well as minimize maintenance costs.

To ensure security and to avoid the spread of viruses, employees accessing the internet through a computer attached to PCA’s network must do so through an approved internet firewall. Accessing the internet directly by modem is strictly prohibited unless the computer you are using is not connected to PCA’s network.

Files obtained from sources outside PCA including disks brought from home; including files downloaded from the internet, news groups, bulletin boards, or other online services; files attached to email; and files provided by students, parents, or vendors, may contain dangerous computer viruses that may damage PCA’s computer network. Employees should never download files from the internet, accept email attachments from outsiders, or use disks from non-PCA sources, without first scanning the material with PCA approved virus checking software. If you suspect that a virus has been introduced into PCA network, notify technology personnel immediately.

### Violations of this Policy

Violations of this policy will be taken seriously and may result in disciplinary action, including possible termination, and civil and criminal liability.

### Amendment and Modification of this Policy

PCA reserves the right to modify this policy at any time, with or without notice. PCA may require employees to acknowledge and comply with a separate Acceptable Use Policy for Internet and Network Resources, which shall control in the event of a conflict.

## SOCIAL MEDIA AND VIDEO CONFERENCING POLICIES

PCA has adopted the following policy with regard to employees’ behavior on social networking sites including but not limited to Facebook, Twitter, LinkedIn, Pinterest, Instagram, Snapchat and YouTube. PCA has also adopted a policy regarding employees’ behavior during video conferencing. If you wish to use networking protocols or set up a social media site as a part of the educational process, please work with your administrators and technology staff to identify and use a restricted, School-endorsed networking platform. Such sites will be the property of the School who will have unrestricted access to, and control

of, such sites.

This policy is intended to supplement, not replace, the School's other policies, rules, and standards of conduct. For example, School policies on confidentiality, use of School equipment, professionalism, employee references and background checks, workplace violence, unlawful harassment, and other rules of conduct are not affected by this policy.

You are required to comply with the following rules and guidelines when participating in social media activities that are governed by this policy:

- Comply with the law at all times. Do not post any information or engage in any social media activity that may violate applicable local, state, or federal laws or regulations.
- Do not engage in any discriminatory, harassing, or retaliatory behavior in violation of School policy.
- Respect copyright, fair use, and financial disclosure rules and regulations. Identify all copyrighted or borrowed material with proper citations and/or links.
- Maintain the confidentiality of the School's trade secrets and private or confidential information. Trade secrets may include information regarding the development of systems, processes, products, know-how, and technology. Do not post internal reports, policies, procedures, or other internal business-related confidential communications. This prohibition applies both during and after your employment with the School.
- Do not post confidential information (as defined in this Handbook) about the School, its employees, or its students. Remember that most student information is protected by the Family Educational Rights and Privacy Act, including any and all information that might identify the student. Publicizing student work and accomplishments is permitted only if appropriate consents are obtained.
- While limited and incidental social media activities at work may be tolerated, such social media activities may not interfere with your job duties or responsibilities. Do not use your School-authorized e-mail address to register on social media websites, blogs, or other online tools utilized for personal use.
- Be knowledgeable about and comply with the School's background check procedures.
- Be knowledgeable about and comply with the School's reference policy. Do not provide employment references for current or former employees, regardless of the substance of such comments, without prior approval from the School.
- We encourage you to be fair and courteous to fellow employees, students, parents, vendors, customers, suppliers, or other people who work on behalf of the School. We also encourage you to avoid posting statements, photographs, video, or audio that could be reasonably viewed as malicious, obscene, threatening, or intimidating, that disparage employees, students, parents, vendors, customers, suppliers, or other people who work on behalf of the School, or that might constitute harassment or bullying.
- Make sure you always try to be honest and accurate when posting information or news, and if you make a mistake, correct it quickly. Please do not post any information or rumors that you know to be false about the School, fellow employees, students, parents, vendors, customers,

suppliers, people working on behalf of the School, or competitors.

- Never represent yourself as a spokesperson for the School unless authorized to do so. If you publish social media content that may be related to your work or subjects associated with the School, make it clear that you are not speaking on behalf of the School and that your views do not represent those of the School, fellow employees, students, parents, vendors, customers, suppliers, or other people working on behalf of the School. It is best to use a disclaimer such as “The postings on this site are my own and do not necessarily reflect the views of the School.”
- Never be false or misleading with respect to your professional credentials.
- Do not take any photos, videos, or other media in the workplace or on the School’s premises or at School functions without permission of the School. It is your responsibility to ensure that your posts do not contain any prohibited information, or Confidential Information, including, but not limited to, photos, videos, or other media referencing or relating to student information, even if the student(s) is/are not specifically identified by name but could be easily determined or may be perceived as identifying any student or group of students. Violations may result in disciplinary action, up to and including termination.
- Supervisors who “friend” subordinates on social media accounts (whether personal or School accounts) are responsible for abiding by this policy at all times and immediately reporting any violations of this policy to. Failure to do so may result in disciplinary action, up to and including termination.

Employees are not to initiate “friendships” with students or parents. Employees shall not accept students as friends on any personal social networking sites and are to decline any student-initiated friend requests. Employees must delete any students already on their “friends” list immediately. Employees should also be aware that participation in social media, even in a private setting, may not remain private and posts may become public knowledge and/or reported to the school.

Employees should weigh whether a particular posting or explicit/implicit message puts their effectiveness as a School employee at risk. PCA encourages employees to post only what they want the world to see. Imagine that students, their parents, or administrators will visit your site as most information is available to the general public even after it is removed from the site. Employees may not discuss students nor post images that include students.

### Personal or Professional Blogs

This policy should not be construed, and will not be applied, in a manner that violates employee rights under the National Labor Relations Act.

Employees may not comment on a student’s blog or a student’s other social networking commentaries.

Employees may not use trade names, or logos belonging to the School without express written permission of the Executive Director.

In the event you have any questions about whether a particular social media activity may involve or implicate the School, or may violate this policy, please contact Human Resources. Social media is in a state of constant evolution, and the School recognizes that there will likely be events or issues that are not

addressed in these guidelines. Thus, each School employee is responsible for using good judgment and seeking guidance, clarification, or authorization before engaging in social media activities that may implicate this policy.

Failure to comply with PCA's social media policy will result in disciplinary action, up to, and including, immediate termination.

## EQUIPMENT POLICY

PCA attempts to provide all staff members with the equipment and supplies needed to do their job. Providing equipment is a great expense to the School. It is expected that everyone will protect and care for all equipment and supplies issued to them. Staff members are responsible for the cost of lost, stolen, or broken items issued to them including: keys, textbooks, teacher guides, laptops, and any other equipment that may be assigned to them if the loss is due to willful misconduct or gross negligence.

### Staff Equipment

Each staff member assigned devices and will be charged for any damages, loss or theft to the laptop caused by willful misconduct or gross negligence.

Although issued to an individual employee, all computing devices are considered the personal property of the primary organizational unit to which the receiving employee belongs and shall be returned upon termination of employment with the School, after reassignment of job duties or immediately upon request at any time by an official of the School.

Employees are expected to take all appropriate measures and precautions to prevent the loss, theft, damage and/or unauthorized use of such equipment. Such precautions shall include, but not be limited to the following:

- Keep the computing device in a locked and secured environment when not being used.
- Do not leave the computing device for prolonged periods of time in a vehicle, especially in extreme temperatures.
- Keep food and drinks away from all computing devices and work areas.
- Do not leave the computing device unattended at any time in an unsecured location (e.g., an unlocked empty office); and
- Keep the computing device in sight at all times while in public places, such as public transportation, airports, restaurants, etc. Should an employee's computing device be lost or stolen, the employee must:
  - Immediately report the incident to their immediate supervisor and/or Executive Director.
  - Obtain an official police report documenting the theft or loss; and
  - Provide a copy of the police report to their immediate supervisor or Executive Director.

If the employee fails to adhere to these procedures, the employee may be held legally and financially responsible to the School for the replacement of such equipment.



The School is under no legal, financial or other obligation to provide for a replacement computing device to any employee whose device is lost, stolen or damaged.

There is no expectation of privacy in School equipment. The School may add security and other tracking technology to any and all computing devices issued by it and any and all such usage is subject to management review, monitoring, and auditing by the School. Other audits may be performed on the usage and internal controls as deemed necessary.

Non-compliance with any policies or procedures regarding Employee Computers and Portable Computing Devices issued by the School will result in appropriate disciplinary action and/or reimbursement of any and all costs to the School.

## CELL PHONE POLICY

Generally personal cell phone use is not permitted while you are working. Cell phones should be turned off and stored with your other personal belongings while you are working.

Notwithstanding the foregoing, employees may, in the event of an “emergency condition,” access their mobile device or other communications device for seeking emergency assistance, assessing the safety of the situation, or communicating with a person to verify their safety. For purposes of this policy, an “emergency condition” is defined as:

- Conditions of disaster or extreme peril to the safety of persons or property at the workplace or worksite caused by natural forces or a criminal act; or
- An order to evacuate a workplace, a worksite a worker’s home, or the school of a worker’s child due to natural disaster or a criminal act.

If you are required to perform business on a cell phone for PCA while driving, you must utilize the hands-free option on the cell phone or a headset/earpiece device. Sending, writing, or reading text based communications on your cell phone while driving a School vehicle or your own vehicle to conduct School business is prohibited. Text based communications include, but are not limited to, text messages, instant messages, and email.

If you are assigned a School cell phone to conduct School business, please notify your supervisor if the cell phone is misplaced, stolen, or damaged. Personal calls, received or placed, are not allowed on School cell phones.

### Telephone Calls and Texting

While at work and during staff meetings, the employee’s undivided attention is expected. Cell phones, texting, and pagers are not allowed so that the activities or discussion are not disturbed. Employees should wait to make personal phone calls during breaks.

## NO SOLICITATION/DISTRIBUTION POLICY

PCA’s Communication Systems may not be used to solicit for political causes, commercial enterprises,



outside organizations, or other non-job-related solicitations. Approval from the Executive Director is required before anyone can post any information on commercial on-line systems or the internet.

In order to minimize non-work-related activities that could interfere with providing quality education, teamwork, and safety, PCA has established the following policy concerning solicitation and the distribution of written materials other than those directly related to the School's business.

Non-employees may not solicit or distribute written materials of any kind at any time on premises that are owned, leased, operated, managed, or controlled by PCA.

Employees may not solicit other employees during the workday when either the person doing the solicitation or the person being solicited is engaged in or required to be performing work tasks.

Employees may not distribute written materials of any kind during the workday when either the distributing employee or the employee receiving the materials is engaged in or required to be performing work tasks.

Additionally, distribution of written materials of any kind by PCA employees is prohibited at all times in all working areas on School premises.

Employees may solicit other employees when both parties are on non-work time. Employees may distribute written materials in non-work areas during non-work time.

The sole exceptions to this policy are charitable and community activities supported and approved by PCA.

School bulletin boards are the only areas where any merchandise or notices may be placed. Such items must meet the guidelines established by the School. PCA must approve any postings prior to posting.

PCA reserves the right to discontinue any solicitation or distribution if the activities become disruptive to employees or the efficient operation of the School's business.

Employees are required to leave School premises and other work areas at the completion of their workday. Employees are not permitted to enter or remain on School premises or work areas unless the employee is on duty, scheduled for work, coming to or departing from scheduled work, or otherwise has specific authorization from their supervisor.

## Definitions

School "premises": property owned, leased, operated, managed, or controlled by the School, including buildings, parking lots, and play areas that the School has the right to use exclusively or in common with others, vehicles owned or operated by the School.

Work time: any time when employees are engaged in or required to be performing work tasks or are otherwise "on the clock." Work time does not include break periods, meal times, or other periods during the workday when employees are properly not engaged in performing their work tasks.

Work areas: all areas controlled by the School where employees are performing work, except, employee

break areas, and parking lots (non-work areas).

### Employee Responsibility

If you have a need to solicit and/or distribute materials on School premises, it must be in compliance with this policy. If you have questions, talk with Human Resources. If solicitation or distribution is conducted within the parameters of this policy, the manner of activities must not harass or intimidate other employees. If you are subjected to such behavior at any time, report the activity to your supervisor. If solicitation or distribution occurs while you are working, report the activity to your supervisor.

## ANTI-NEPOTISM POLICY

### Policy Statement

It is the policy of PCA to avoid Nepotism, which means to avoid creating or maintaining circumstances in which the appearance or possibility of favoritism, conflicts of interest, or management disruptions exist due to a relationship between a PCA decision-maker and their Family Member. This policy is to ensure effective supervision, internal discipline, security, safety, and positive morale in the workplace and to avoid the potential for problems of actual or perceived favoritism, conflicts in loyalty, discrimination, and appearances of impropriety or conflict of interest. This policy applies to all PCA board members, employees, individual consultants hired or retained by PCA, and School Services Providers hired or retained by PCA.

Relationships between PCA board members, employees, consultants, or School Services Providers are permissible under the following circumstances:

- Family Members of PCA board members, employees, individual consultants, or School Services Providers shall not be hired for or retained in an employment position if one Family Member would have the authority or be in a position to directly supervise, hire, or discharge the other.
- Any time a board member, employee, individual consultant, or School Services Provider is a Family Member of another, the relationship shall not result in an adverse impact on work productivity or performance. The determination of whether there is an adverse impact shall be in the discretion of the supervisor(s) of the employee(s), consultant(s), or School Services Provider(s), or in the case of a board member, in the discretion of the PCA Board of Directors.
- Any time a board member, employee, individual consultant, or School Services Provider is a Family Member of another, the relationship shall not create an actual conflict of interest under the law, and shall not create a detrimental perceived conflict of interest. The determination of whether there is a detrimental perceived conflict of interest shall be in the discretion of the supervisor(s) of the employee(s), consultant(s) or School Services Provider(s), or in the case of a board member, in the discretion of the PCA Board of Directors.

### Definitions

“Family Members” include an employee's parent, child (natural, adopted, or legal guardianship), spouse, domestic partner, brother, sister, grandparent, grandchild, step-relationships within the preceding categories, brother-in-law, sister-in-law, son-in-law, daughter-in-law, mother-in-law, and father-in-law.

“Nepotism” describes a work-related situation in which there is the potential for favoritism toward a Family Member (such as giving a job, promotion, biased performance reviews, or more favorable working conditions) on the basis of the familial relationship.

“School Services Provider” shall mean any provider of school services to PCA, and in the case of an organization shall mean be the responsible individual at such organization that provides school services to PCA.

## Procedures

When a Family Member of a current PCA board member, employee, individual consultant, or School Services Provider applies to become a board member or employee, or requests to be a consultant or School Services Provider, the Family Member’s application/request must be denied if a conflict under this policy exists (*e.g.*, if one Family Member would have the authority or be in a position to directly supervise, hire, or discharge the other). Special circumstances may be reviewed by the Board in the event that PCA’s best interests would be served otherwise.

When a Family Member of a current PCA board member, employee, individual consultant, or School Services Provider applies for a transfer to a new employment position within PCA, the Family Member’s application must be evaluated to determine whether a conflict under this policy exists. If a conflict exists, the application for transfer must either be denied or one of the Family Members must seek a position transfer to avoid the conflict, if any such opportunity exists. In the event that no such opportunity exists, the application for transfer must be denied.

In implementing this policy, it is permissible to ask an applicant, potential consultant, or School Services Provider to state whether they have a Family Member who is presently employed by or on the board of PCA, but such information may not be used as a basis for an employment decision except as stated herein.

When a relationship that creates a conflict with this policy occurs during employment, PCA will attempt to arrange a transfer or change in position/duties to eliminate the conflict. If a suitable transfer/change in position/duties is not available, one of the employees may be separated from service. Every attempt will be made to effect transfer or separation on the basis of agreement between the employees involved and PCA. If a mutual agreement is unattainable, the Board will determine, in PCA’s best interest, which employee is to be transferred or separated.

## Responsibilities

The Executive Director or designee shall coordinate with the current employee’s direct supervisor to develop appropriate plans to ensure that a Family Member’s employment does not conflict with this policy. If the situation cannot be resolved by a transfer, then the Executive Director or designee will deny the application for employment. Special circumstances may be reviewed by the Board in the event that PCA’s best interests would be served by the employment of a Family Member.

The Executive Director or designee shall investigate reports of Nepotism and take appropriate action. Employees are required to disclose changes in their personal situations to the Executive Director or designee which may be covered by this policy. Supervisors may inquire about the family relationship

between employees to determine the appropriateness of the working relationship under this policy. The Board shall make the final determination concerning potential conflicts with this policy involving the Executive Director.

## BUILDING SECURITY/SCHOOL KEYS

All employees who are issued keys to any building or office are responsible for their safekeeping.

You will be assigned all appropriate building keys needed to conduct your daily job responsibilities. You are responsible for all keys. Duplication of any School key is not allowed and strictly prohibited. It is against School policy to loan or distribute your assigned keys to another employee or non-employee of the School. If your school keys are lost, misplaced, destroyed, or stolen, you must report it immediately to the Executive Director.

The last employee, or a designated employee, who leaves the office and /or the school site at the end of the business day assumes the responsibility to ensure that all doors are securely locked, the alarm system is armed, thermostats are set on appropriate evening and/or weekend setting, and all appliances and lights are turned off with exception of the lights normally left on for security purposes. Employees are not allowed on school property before or after hours without prior authorization.

## INTERNAL INVESTIGATIONS & SEARCHES

From time to time PCA may conduct internal investigations pertaining to security, auditing, or work-related matters. Employees are required to cooperate fully with and assist in these investigations if required to do so.

In PCA's discretion, employees' work areas (i.e., desks, file cabinets, lockers, etc.) may be subject to a search without notice. Employees are required to cooperate. Because even a routine search for PCA property might result in the discovery of an employee's personal possessions, all employees are encouraged to refrain from bringing into the workplace any item of personal property that they do not wish to reveal to PCA. PCA will generally try to obtain an employee's consent before conducting a search of work areas, but it may not always be able to do so. Employees have no expectation of privacy in their work areas.

## VIOLENCE IN THE WORKPLACE

PCA has adopted a policy prohibiting workplace violence. Consistent with this policy, acts or threats of physical violence, including intimidation, harassment, bullying, and/or coercion, which involve or affect PCA or which occur on PCA property will not be tolerated. Examples of workplace violence include, but are not limited to, the following:

- All threats or acts of violence occurring on PCA premises, regardless of the relationship between PCA and the parties involved
- All threats or acts of violence occurring off PCA premises involving someone who is acting in the

### capacity of a representative of PCA

Specific examples of conduct, which may be considered threats or acts of violence, include, but are not limited to, the following:

- Hitting or shoving an individual
- Threatening an individual or their family, friends, associates, or property with harm
- Intentional destruction or threatening to destroy PCA property
- Making harassing or threatening phone calls
- Harassing surveillance or stalking (following or watching someone)
- Unauthorized possession or inappropriate use of firearms or weapons

PCA's prohibition against threats and acts of violence applies to all persons involved in PCA's operation, including but not limited to all personnel, contract, unpaid interns, volunteers and temporary workers, and anyone else, including parents on PCA property. Violations of this policy by any individual on PCA property will lead to disciplinary action, up to and including termination and/or legal action as appropriate. All employees are encouraged to report incidents of threats or acts of physical violence of which they are aware to their supervisors or to their Executive Director.

If an employee becomes aware of an imminent act of violence, a threat of imminent violence, or actual violence, emergency assistance must be sought immediately. In such situations, the employee should contact the law enforcement authorities by dialing 911. Immediately after contacting the law enforcement authorities, the employee must report the

There will be no retaliation against any employee who brings a complaint in good faith under the Violence in the Workplace Policy or who honestly assists in investigating such a complaint, even if the investigation produces insufficient evidence that there has been a violation, or if the charges cannot be proven. However, disciplinary action may be taken against employees who, in bad faith, make false or frivolous accusations.

In certain circumstances, the School may seek a workplace violence restraining order on behalf of one or more employees in furtherance of its commitment to providing a workplace that is free from acts of violence or threats of violence.

## SECTION 11 – STANDARDS OF CONDUCT

### PERSONAL STANDARDS

#### School Dress Code

It is the goal of the school to foster a professional work environment for all staff, as part of our commitment to providing excellent customer service to our families, our communities, our professional associates, and respect for one another.

#### General Rules

Clothing should be clean, free of wrinkles, rips or tears, and appropriate for the workplace. Nothing too tight or revealing (i.e., nothing too low cut in the front or back, or sheer), no bare midriffs, no spaghetti straps, and no undergarments showing. No shorts or yoga pants. No offensive language or images. Hair should be clean and neatly groomed. Please cover tattoos whenever possible.

#### Casual Business Attire

##### Tops:

- Polo style or button-down shirts or blouse
- Pullovers or sweaters
- \*No tank tops

##### Bottoms:

- Skirt (no more than 3" above the knee)
- Dress slacks or Khakis
- Capri pants
- Denim jeans

##### Dresses:

- No more than 3" above the knee

##### Hats:

- School hats

##### Shoes:

- Comfortable and professional: This may include dress shoes, boots, heels, sandals, or flats.
- \*If you are in a position where you are moving items or furniture, please wear closed-toe shoes.

## TEACHER-STUDENT INTERACTIONS

### Boundaries Defined

For the purposes of this policy the term “boundaries” is defined as acceptable professional behavior by staff members while interacting with a student. Trespassing beyond the boundaries of a student-teacher relationship is deemed an abuse of power and a betrayal of public trust.

### Acceptable and Unacceptable Behavior

Some activities may seem innocent from a staff member’s perspective, but some of these activities can be perceived as flirtation or sexual insinuation from a student or parental point of view. The purpose of the following lists of unacceptable and acceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to, or may be perceived as, inappropriate or sexual misconduct.

Staff members must understand their own responsibilities for ensuring they do not cross the boundaries as written in this policy. Disagreeing with the wording or intent of the established boundaries will be considered irrelevant for any required disciplinary purposes. Thus, it is critical that all employees study this policy thoroughly and apply its spirit and intent in their daily activities.

### Unacceptable Behaviors

These lists, and any subsequent lists, are not meant to be all-inclusive, but rather illustrative of the types of behavior addressed by this policy.

- Giving gifts to an individual student that are of a personal and intimate nature
- Kissing of ANY kind
- Any type of unnecessary physical contact with a student in a private situation
- Intentionally being alone with a student away from school
- Making, or participating in, sexually inappropriate comments
- Sexual jokes, or jokes/comments with sexual overtones or double-entendres
- Seeking emotional involvement (which can include intimate attachment) with a student beyond the normative care and concern required of an educator
- Listening to or telling stories that are sexually oriented
- Discussing inappropriate personal troubles or intimate issues with a student in an attempt to gain their support and understanding
- Becoming involved with a student so that a reasonable person may suspect inappropriate behavior
- Giving students a ride to/from school or school activities without parental permission
- Being alone in a room with a student at school with the door closed
- Going into PCA students’ homes during work hours unless there is a special work-related

circumstance and express permission has been granted by executive leadership

- Bringing your own children into PCA students' homes
- Allowing students in your home during work hours
- Remarks about the physical attributes or physiological development of anyone
- Excessive attention toward a particular student
- Sending emails, text messages, Facebook responses, or letters to students if the content is not about school activities

### Acceptable and Recommended Behaviors

- Obtaining parent's written consent for any school activity (exclusive of tutorials)
- Obtaining formal approval (site and parental) to take students off school property for activities such as field trips or competitions
- Emails, text-messages, phone conversations, and other communications to and with students, if permitted, must be professional and pertain to school activities or classes (communication should be initiated via school-based technology and equipment)
- Keeping the door open when alone with a student
- Keeping reasonable and appropriate space between you and the student
- Stopping and correcting students if they cross your own personal boundaries
- Keeping parents informed when a significant issue develops about a student
- Keeping after-class discussions with a student professional and brief
- Immediately asking for advice from senior-staff or administration if you find yourself in a difficult situation related to boundaries
- Involving your supervisor in discussion about boundaries that have the potential to become more severe (including but not limited to: grooming or other red flag behaviors observed in colleagues, written material that is disturbing, or a student's fixation on an adult)
- Making detailed notes about an incident that in your best judgment could evolve into a more serious situation later
- Recognizing the responsibility to stop unacceptable behavior of students and/or co-workers
- Asking another staff member to be present, or within close supervisory distance, when you must be alone with a student after regular school hours
- Prioritizing professional behavior during all moments of student contact
- Asking yourself if any of your actions, which are contrary to these provisions, are worth sacrificing your job and career

### Reporting

When any staff member becomes aware of another staff member, volunteer, guest or vendor having crossed the boundaries specified in this policy, or has a reasonable suspicion of misconduct, they must report the suspicion to their immediate supervisor or the Executive Director promptly. Reasonable suspicion means it is based on facts which would lead a reasonable person to believe the conduct occurred. Prompt reporting is essential to protect students, the suspected staff member, any witnesses, and the School as a whole. Employees must also report to the administration any awareness of, or concern



about, student behavior that crosses boundaries, or any situation in which a student appears to be at risk for sexual abuse.

### Investigating

The School will promptly investigate and document the investigation of any allegation of sexual misconduct or inappropriate behavior, using such support staff or outside assistance, as it deems necessary and appropriate under the circumstances. Throughout this fact-finding process, the investigating administrator, and all other privy to the investigation, shall protect the privacy interests of any affected student(s) and/or staff member(s) including any potential witnesses, as much as possible.

### Consequences

Staff members who have violated this policy will be subject to appropriate disciplinary action, and where appropriate, will be reported to authorities for potential legal action.

## CUSTOMER & PUBLIC RELATIONS

The School's image in front of students, parents (i.e., our "customers") and the general public is critical to our success. All employees are expected to be prompt, polite, courteous and attentive to our customers and the public. It is possible an employee may come into contact with a dissatisfied or hostile individual based on the nature of the employee's work. If this happens, you should immediately notify your supervisor or the Executive Director. We will absolutely not tolerate conduct toward our customers or the general public that might be interpreted as unlawful discrimination or harassment. If you witness conduct in violation of this policy, you should immediately bring it to the attention of your supervisor or the Executive Director.

## STANDARDS OF CONDUCT AND CIVILITY

At PCA, we are committed to upholding the highest standards of personal integrity and conduct. These standards are based on our dedication to treating people with dignity, respect, and civility, and taking individual and collective responsibility for our conduct. The manner in which we conduct ourselves defines us and how we are perceived by others. As school employees, we also serve as role models to our students.

PCA employees are accountable for integrity in conduct and for the consequences of their actions or inactions. The highest of ethical standards are expected in all matters internal, as well as with students, parents, and the community at large. All employees and any individuals acting on behalf of PCA are required to conduct themselves in compliance with the essence of this Standards of Conduct and Civility policy. Any concerns must be promptly reported to a supervisor or the Human Resources. Failure to comply with this policy may result in disciplinary action, up to and including termination.

Children must have adult supervision at all times.

## CIVILITY

- Everyone treats each other with civility, dignity, respect and professionalism at all times
- Employees exercise emotional self-control and sensitivity to feelings of others not with blame or recrimination
- Employee behavior supports an environment where everyone feels safe, secure and respected.

## PROHIBITED CONDUCT

The following is a list of conduct that is prohibited and will not be tolerated by the School. It is not an all-inclusive list, but rather a list designed to give examples of the types of conduct prohibited by the School.

- Falsification of employment records, employment information, or other School records
- Recording the work time of another employee or allowing any other employee to record your work time, or allowing falsification of any time card, either your own or another's
- Theft, deliberate or careless damage, or loss of any School property or the property of any employee or customer
- Provoking a fight or fighting during working hours or on School property
- Participating in horseplay or practical jokes on School time or on School premises where such conduct might be a safety risk or might be interpreted as offensive
- Carrying firearms or any other dangerous weapons on School premises at any time or while acting on behalf of the School
- Any conduct that has gained sufficient notoriety so as to impair the employee's school-related relationships
- Any willful conduct that endangers the safety, health or wellbeing of another individual
- Any act of sufficient magnitude to cause disruption of work or gross discredit to the school
- Immoral conduct
- Unfitness for service
- Violation of the Substance and Alcohol policy
- Insubordination, including but not limited to, failure or refusal to obey the orders or instructions of a supervisor or member of administration, or the use of abusive or threatening or abusive language toward a supervisor or member of administration
- Unreported absence on scheduled workdays unless otherwise excused
- Excessive tardiness or absenteeism unless otherwise excused
- Unauthorized use of School equipment, time, materials, facilities, or the School name
- Sleeping or malingering on the job
- Failure to observe working schedules, including the required rest and meal periods
- Soliciting other employees for membership, funds, or other similar activity in connection with any outside organization during your working time or the working time of the employee(s) solicited
- Distributing unauthorized literature or any written or printed material during working time or in

work areas (“Working time” does not include your meal and break periods.)

- Failure to timely notify your supervisor when you are unable to report to work absent extenuating circumstances
- Failure of an employee to obtain permission to leave work for any reason during normal working hours
- Abuse of sick leave
- Violation of the Communications Policy
- Violation of the Standards of Conduct and Civility Policy
- Failure to provide a physician’s certificate when requested or required to do so
- Violating the School’s Personal Standards or dress code
- Breaching confidentiality
- Making derogatory racial, ethnic, religious, or sexual remarks or gestures; any violation of the Harassment and/or Equal Employment Opportunity policy; or using profane or abusive language at any time on School premises or during working hours
- Violation of any safety, health, security, or School rule
- Negligence or other conduct leading to the endangerment of harm of a child or children
- Working overtime without authorization or refusing to work assigned overtime
- Unsatisfactory job performance
- Willfully or maliciously making false statements regarding any co-worker or submitting a complaint known to be false

## CONFIDENTIAL INFORMATION

It is important to the School to protect and preserve its trade secrets and confidential information. Confidential information includes, but is not limited to, student information, all student lists, techniques and concepts, marketing plans, design specifications, design plans, strategies, forecasts, bid plans, bid strategies, bid information, contract prices, new products, software, computer programs, writings, and all know-how and show-how whether or not protected by patent, copyright, or trade secret law.

The School prohibits audio or video recordings in the workplace, during working hours, without authorization of the School due to privacy and confidentiality concerns and protections.

The School devotes significant time, energy, and expense to develop and acquire its trade secrets and confidential information. As an employee of the School you will, during the course of your employment, have access to and become familiar with various trade secrets and confidential information that are owned by the School. An employee shall not, directly or indirectly, disclose or use any of the foregoing information other than for the sole benefit of the School, either during the term of your employment or at any other time thereafter. This information shall not be disclosed except through normal channels and with authorization. Any and all trade secrets or confidential information shall be returned to the School during extended leaves of absence or upon termination.

During your employment with the School, you will not be permitted nor required to breach any obligation

to keep in confidence proprietary information, knowledge, or data acquired during your former employment. You must not disclose to the School any confidential or proprietary information or material belonging to former employers or others.

Upon an extended leave of absence, request from the School or termination of employment, employees are required to immediately return to the School all property of the School in as good condition as when received (normal wear and tear excepted) including, but not limited to, all files, records, documents, drawings, specifications, lists, equipment and supplies, promotional materials, and similar items relating to the business of the School. This policy also encompasses any and all identifying or confidential information of all former and current students which is protected under the Family Educational Rights and Privacy Act.

Violations of this policy may result in disciplinary action, up to and including termination.

## CONFLICTS OF INTEREST

All employees must avoid situations that result in actual or even potential conflicts of interest. Personal, social, and economic relationships with competitors, suppliers, customers, parents, or co-employees that may impair an employee's ability to exercise good judgment on behalf of the School or which give the appearance of such impairment create an actual or potential conflict of interest. For example, romantic or personal relationships between a supervisor and subordinate employee can lead to supervisory problems, claims of harassment, and morale problems.

Any employee involved in such situations or relationships must immediately and fully disclose the nature of the situation or relationship to the Executive Director so a determination can be made as to whether an actual or potential conflict exists, and if so, how to correct the situation.

Employees shall not be financially interested in any contract made by them in their official capacity.

PCA expects employees to devote their best efforts to the interests of our school. PCA recognizes your right to engage in activities outside of your employment, which are of a private nature and unrelated to our business. However, outside activities (second jobs, side businesses, clubs, etc.) must not interfere with your ability to fully perform your job duties at PCA or create a conflict of interest with your statutory duty of loyalty to the School. The School prohibits employees from working with another School or external organization that competes with PCA whether as a regular employee or as a consultant.

If you have any questions whether an action or proposed course of conduct would create a conflict of interest, you should immediately contact the Executive Director to obtain advice on this issue. A violation of this policy will result in immediate and appropriate discipline, up to and including, immediate termination.

This policy is in addition to PCA's Revised Nonprofit Conflict of Interest Policy and Conflict of Interest Code.

## Outside Employment

If you are a full-time employee we expect that you devote your full professional effort to your position at

PCA. If you wish to participate in outside work activities you are required to obtain written approval from the Executive Director prior to starting those activities. Approval will be granted unless the activity conflicts with PCA's interests. In general, outside work activities are not allowed when they:

- Prevent you from performing work for which you are employed at PCA.
- Involve organizations that are doing or seek to do business with PCA including actual or potential vendors.
- Violate provisions of law or PCA policies or rules.
- When the employee is on a medical leave (FMLA/CFRA/PDL or any other medical leave).

Your obligations to PCA must be given priority. Full-time employees are hired and continue employment with the understanding that PCA is their primary employer and that other employment, commercial involvement or volunteer activity that is in conflict with the business interests of the school is strictly prohibited.

## POLICY REGARDING INCONSISTENT, INCOMPATIBLE OR CONFLICTING EMPLOYMENT, ACTIVITY OR ENTERPRISE BY SCHOOL PERSONNEL

### Policy Statement

It is the policy of PCA that its officers and employees may not engage in any outside activity, employment, or enterprise for compensation which is inconsistent, incompatible with, or in conflict with, their duties as an officer or employee of PCA. During working hours or on school premises, officers or employees shall not engage in political or religious activities, or recruit or solicit students or members of the public for political or religious activities.

An officer's or employee's outside activity, employment, or enterprise for compensation shall be determined to be inconsistent, incompatible with, or in conflict with, their duties as an officer or employee of PCA if any of the following apply:

- It involves the use of PCA time, facilities, equipment, supplies, or the officer's or employee's position or influence with PCA, for private gain or advantage.
- It involves receipt or acceptance by the officer or employee of any money or other consideration for the performance of an act that would otherwise be required within the scope of the officer or employee's duties with PCA.
- It involves the performance of an act as part of the outside activity that involves services performed for PCA.
- It affects the officer's or employee's work hours, interferes or conflicts with the officer's or employee's job duties, raise any ethical or conflict of interest concerns, or create any conditions that impact the officer's or employee's job performance.

Officers and employees may not use PCA's name, logo, supplies, equipment or other property in connection with any outside activities.

## Procedure

In the event that an officer or employee believes that an outside activity for compensation may be inconsistent, incompatible with, or in conflict with, their duties as an officer or employee of PCA, the officer or employee shall obtain a written determination of the Executive Director or designee that the outside activity is not in violation of this policy before engaging in such activity.

## EXPENSE REIMBURSEMENT POLICY

PCA will reimburse employees for certain reasonably necessary business expenses incurred in the furtherance of PCA business. In order to be eligible for reimbursement, employees must follow the protocol set forth in the school's relevant fiscal and accounting policies and procedures. In general, the immediate supervisor must have previously approved all expenses, prior to the employee spending money. All receipts pertaining to the reimbursement must be original and detailed, and should be submitted to the appropriate supervisor for review and approval, prior to submission for final approval and payment.

## POLICY CONFIRMING RESTRICTION ON THE PROVISION OF FUNDS OR OTHER THINGS OF VALUE TO STUDENTS, PARENTS OR GUARDIANS

### Policy Statement

It is the policy of PCA that PCA shall not provide any funds or thing of value to any student or their parent or guardian that a school district could not legally provide to a similarly situated student, or their parent or guardian. PCA does not and shall not provide, for example, "sign up bonuses" to parents or guardians or other incentives unrelated to education.

Additionally, a student, parent or guardian shall not use their status as a student, parent or guardian with PCA in order to obtain funds or things of value from PCA. For example, this policy prohibits an individual from utilizing their status as a parent or guardian to obtain a vendor contract with PCA for compensation. It also prohibits an individual from utilizing their status as a parent or guardian to refer or encourage any students enrolled in PCA, or their parents or guardians, to select that individual or their company or their another provider of services, in connection with the student's education at PCA, resulting in the individual's receipt of funds or thing of value from PCA.

### Procedures

The prior approval of the Executive Director or designee must be obtained for any of the following in order to ensure that it does not conflict with this policy:

- Any funds or thing of value provided to a student, parent or guardian which has not previously been approved. This applies in any situation in which a student, parent or guardian would any funds or thing of value, whether in their capacity as a student, parent, guardian, vendor, service provider or other circumstance.
- Any proposed incentive to be offered to students or parents.

In requesting approval, the educational purpose of any such funds, thing of value or incentive must be provided to the Executive Director or designee.

## SECTION 12 – SAFETY

### SUBSTANCE AND ALCOHOL POLICY

It is the intent of PCA to promote a safe, healthy and productive work environment for all employees. The School recognizes that the illegal and/or excessive use of drugs and/or alcohol is not conducive to safe working conditions, employees' health, efficient operations, or School success.

For purposes of this policy, "illegal drugs" includes, but is not limited to, substances that are prohibited by law (such as cocaine, heroin, etc.), controlled substances, marijuana (including medicinal marijuana, and marijuana vaping or other recreational marijuana use), and prescription drugs (if they are not prescribed for the person using them and/or not being used as prescribed). "Drug paraphernalia" means any accessory for the use, possession, manufacture, distribution, dispensation, purchase, or sale of illegal drugs. "Under the influence" means that the employee is affected by alcohol, prescription medication that impairs cognitive or physical functions, and/or illegal drugs in any detectable manner.

The School complies with all Federal and State regulations regarding drug use while on the job. This policy prohibits the following:

- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia, or alcohol during working hours, including meal and break periods, or in the presence of pupils
- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia, or alcohol on School property at any time
- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia, or alcohol while attending a School function or event
- Storing alcohol (if unauthorized), illegal drugs, or drug paraphernalia in a locker, desk, automobile, or other repository on the School's premises
- Refusing to submit to an inspection or testing when requested by administration
- Being under the influence of illegal drugs, prescription medication that impairs cognitive or physical functions and/or alcohol during working hours, while on the School's premises and/or attending a School function or event
- Conviction under any criminal drug statute for a violation occurring in the workplace, including failure to notify the School in writing of employee's conviction for a violation of a criminal drug statute occurring in the workplace no later than 5 calendar days after such conviction; or
- Failure to keep all prescribed medicine in its original container

Employees taking physician-prescribed medications, which impairs the employee's job performance, (including medical prescribed or recreational marijuana) should not report to work. In addition, if you are required to take any kind of prescription or nonprescription medication that will affect your ability to perform your job, you are required to report this to Human Resources. Human Resources will determine if it is necessary to temporarily place you on another assignment or take other action as appropriate to protect your safety and the safety of other employees and students. Employees taking physician-prescribed medication which will not impair their job performance may be required to present a



statement from the prescribing physician to the employee's supervisor indicating the duration of the prescription and stating that the use of the prescription will not impair the employee's ability to perform their specific job duties. This policy does not require or request the prescribing physician or the employee to identify any prescription drug or the medical condition for which it is prescribed. No employee shall use or have in their possession on the School premises any prescription medication other than medications currently prescribed by a physician for the employee.

This policy will not be construed to prohibit the use of alcohol at social or business functions. However, employees must remember their obligation to conduct themselves appropriately at all times while at School-sponsored functions or while representing the School.

The School may at times conduct unannounced searches of School property for alcohol, illegal drugs, drug paraphernalia, and/or unauthorized controlled substances or to ensure compliance with any other School-related policy. This may include desks, storage areas and rooms normally used to store employees' personal property. As a result, employees do not have an expectation of privacy in this regard.

Violation of this Substance and Alcohol Policy may result in disciplinary action, up to and including termination, at the School's sole discretion.

Employees should be aware that participation in a rehabilitation program will not necessarily prevent the imposition of disciplinary action, including termination, for violation of this policy. Employees who undergo voluntary counseling or treatment and who continue to work, if any, must meet all established standards of conduct and job performance.

Compliance with this Substance and Alcohol Policy is a condition of employment at the School. Failure or refusal of an employee to cooperate fully, sign any required document, submit to any inspection, or follow any prescribed course of substance abuse treatment will result in discipline, up to and including termination.

Because the use, sale, purchase, possession, or furnishing of an illegally obtained substance is a violation of the law, the School may report such illegal drug activities to an appropriate law enforcement agency.

The School may require a test by Intoxilyzer, blood test, urinalysis, medical examination of those persons whom the School reasonably suspects of using, possessing, or being under the influence of a drug or alcohol or is acting in such manner that they may harm themselves or another employee.

Any refusal to submit to such testing will be considered a positive screen. An employee's consent to submit to such a test is required as a condition of employment, and an employee's refusal to consent may result in disciplinary action, including termination for a first refusal or any subsequent refusal. The School shall determine the manner in which such testing is conducted with the goal being to ensure that the test results are accurate.

Such a test may be required of employees involved in any work-related accident or unsafe practice where the safety of the employee or other employees was jeopardized. Periodic retesting may also be required following positive test results or after any violation of this policy or rehabilitation.

## SMOKING

All School buildings and facilities are non-smoking facilities. This includes nicotine and non-nicotine cigarettes including (herbal cigarettes) as well as e-cigarettes, cigars, pipes, vaping and/or (both tobacco and marijuana products). Smoking is prohibited within 20 feet of a school building and within 25 feet of a school playground or event location, whichever is farther.

## SECURITY

All employees are responsible for helping to maintain a secure workplace. Be aware of persons loitering for no apparent reason. All staff is expected to question any unknown person seen in the workplace who does not have a visitor's pass. If you are leaving late at night or are in any other situation that presents security concerns or where you do not feel comfortable, please seek the assistance of your Executive Director, other employees or call 911. Report any suspicious persons or activities to your Executive Director. Never attempt to force an individual to leave the workplace if they are uncooperative. Immediately contact your supervisor or school administrators for assistance or call 911. Secure your desk or work area at the end of the day or when called away from your work area for an extended length of time, and do not leave valuable and/or personal articles that may be accessible in or around your work area. Employees shall not use their cell phone or similar device to engage in any form of audio or video recording on school property without the prior written approval of the Executive Director and the written consent of the individual being recorded. Please report any problems with our security systems to your Executive Director.

## VIDEO SURVEILLANCE FOR DANIELSON STREET OFFICE

Pacific Coast Academy ("Charter School") is committed to maintaining a safe and healthy learning environment for all members of the school community. In furtherance of this goal, Charter School has installed security cameras in the hallways, entry ways, inventory rooms, and other locations throughout the administrative office at 13915 Danielson Street, Suites 100, 101, 102 and 200, Poway, California 92064 ("Office") for the safety of visitors and to secure Charter School property.

These systems have visual recording capabilities and the recordings may be retained in Charter School's sole discretion. There are no cameras in restrooms and other similar sensitive locations ("Sensitive Locations").

While in or around the Office, Charter School employees are subject to video surveillance and recording and do not have an expectation of privacy other than while in Sensitive Locations.

## PARKED VEHICLES

Employees are responsible for their own parked vehicles and the personal possessions within while parked on PCA property. Be cautious: keep school property and/or personal possessions out of sight and lock your car. Insuring your vehicle and personal property against loss and damage is recommended for your protection.

## PERSONAL AUTOMOBILE

Employees who use their own automobiles for travel on authorized school business will be reimbursed for mileage at the rate established by the Internal Revenue Services and in accordance with the School's Reimbursement policies. Employee must have prior supervisory approval for the use of personal vehicles and must carry, at their own expense, the minimum insurance coverage for property damage and public liability.

## PERSONAL PROPERTY

PCA cannot be responsible and will assume no liability for any loss or damage to employee personal property resulting from theft, fire, or any other cause on PCA's premises, including the parking area, or away from school property while on school business. PCA employees are prohibited from using personal property for work-related purposes unless approved in advance by the Executive Director.

## SAFETY POLICY

PCA is firmly committed to maintaining a safe and healthy working environment. All employees of the School are expected to be safety conscious on the job at all times. All unsafe conditions or hazards should be corrected immediately. Report all unsafe conditions or hazards to your supervisor or Executive Director immediately, even if you believe you have corrected the problem. If you suspect a concealed danger is present on School premises, or in a product, facility, piece of equipment, process, or business practice for which the School is responsible, bring it to the attention of your supervisor or Executive Director immediately. Supervisors should arrange for the correction of any unsafe condition or concealed danger immediately and immediately contact the Executive Director regarding the problem.

All workplace injuries and illnesses must be immediately reported to your supervisor and Human Resources.

PCA has in place a written Injury and Illness Prevention Program as required by law. Please contact Human Resources for further information.

## ERGONOMICS

PCA has invested in providing a work environment that is safe for all employees. To lessen the risk of ergonomic hazards, the School will make necessary adjustments to an individual's workstation, educate employees on ergonomic safety, and modify processes when deemed necessary to ensure the well-being and safety of our employees. You should report any ergonomic concerns to your Executive Director.

## CHEMICAL EXPOSURE WARNING

Employees should be aware that work areas might contain chemicals known to the State of California to cause cancer or to cause birth defects or other reproductive harm. If you have any questions or concerns about possible chemical exposure in your work area, contact your Executive Director.

## SECTION 13 – TERMINATION

### VOLUNTARY TERMINATION

PCA will consider an employee to have voluntarily terminated their employment if the employee does any of the following: (1) elects to resign from PCA; (2) fails to return from an approved leave of absence on the date specified without notifying the school for the need for continued leave including failure to communicate with the School; or (3) fails to report for work without notice to PCA for three consecutive work days. PCA requests that employees provide at least two weeks written notice of a voluntary termination. All PCA property must be returned immediately upon terminating employment. PCA retains the right to accept resignation immediately and pay the amount of straight time compensation an employee would have earned in lieu of further performance.

### INVOLUNTARY TERMINATION

An employee may be terminated involuntarily for, among other reasons, poor performance, misconduct or other violations of PCA's Rules of Conduct as set forth herein. Notwithstanding the foregoing, or anything else contained in this handbook, PCA reserves the right to terminate any employee at any time, with or without advance notice and with or without cause.

### EXIT INTERVIEWS

All employees who leave employment at PCA may be asked to take part in an exit interview with their supervisor to communicate their challenges and growth while employed at PCA. Information shared during an exit interview will be treated as confidential to the extent possible.

### VERIFICATION AND REFERENCE POLICY

All requests for employment verification, references or personal information verification or disclosures must be directed to Human Resources. Only Human Resources is authorized to provide verifications or references, or disclose personal information, pertaining to current or former employees.

With respect to verification requests, PCA will disclose only the dates of employment and the title of the last position held. PCA will verify or disclose an employee's salary history only if the employee provides written authorization for PCA to provide the information. However, PCA will provide information about current or former employees as required by law or court order. PCA will not provide any letters of reference for current or former employees. Please refer all questions about this policy to Human Resources.

## EMPLOYEE HANDBOOK ACKNOWLEDGEMENT

By my signature below, I acknowledge that I have received a copy of Pacific Coast Academy's ("PCA") Employee Handbook, on the date indicated below and agree to my at-will employment as described below. I acknowledge that it is my responsibility to read and review the Employee Handbook carefully. I also acknowledge that it is my responsibility to ask for clarification if I do not understand any of the policies included in the Employee Handbook.

I also acknowledge that I have received a copy of PCA's Harassment, Discrimination and Retaliation Prevention Policy which is in the Employee Handbook. I understand and agree that it is my responsibility to read and familiarize myself with this policy and all the provisions of the Employee Handbook. I understand that PCA is committed to providing a work environment that is free from harassment, discrimination and retaliation. My signature below certifies that I understand that I must conform to and abide by the rules and requirements described in this policy.

I understand that the Employee Handbook contains important information regarding PCA's expectations, policies and guidelines and that I am expected to comply with these expectations, policies and guidelines at all times. I understand that the Employee Handbook does not provide a binding contract, but provides guidelines for personnel concerning some of PCA's policies.

In particular, I have read and understand PCA's Anti-Nepotism Policy, Policy Regarding Inconsistent, Incompatible or Conflicting Employment, Activity or Enterprise by School Personnel, Policy Confirming Restrictions on the Provision of Funds or Other Things of Value to Students, Parents or Guardians, and restrictions and procedures to avoid Conflicts of Interest.

Just as I am free to terminate the employment relationship with PCA at any time, PCA, in its sole discretion, also reserves the right to modify or terminate the employment relationship with me at any time for any or no reason and with or without notice. Further, there is no agreement, express or implied, written or verbal, between the employee and PCA for any specific period of employment, for continuing or long-term employment, or for guaranteed terms and conditions of employment. No one other than the Executive Director of PCA, with the approval of the Board of Directors, has the authority to alter my employment at-will status, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to this policy. Further, any such agreement must be in writing and must be signed by the Executive Director. This is the entire agreement between PCA and me regarding this subject. All prior or contemporaneous inconsistent agreements are superseded. If I have an individually negotiated written employment agreement with PCA, then the terms and conditions of that agreement will prevail to the extent it differs from the policies in this Handbook.

PCA reserves the right to modify, alter, add to or delete any of the policies, guidelines or benefits contained in this handbook at any time with or without notice.

Other than PCA Board of Directors, no other entity or person has the authority to modify this employee handbook.

Employee Name (print): \_\_\_\_\_

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

# Coversheet

## 2023-2024 Stipend Chart

<b>Section:</b>	V. Consent Agenda
<b>Item:</b>	C. 2023-2024 Stipend Chart
<b>Purpose:</b>	
<b>Submitted by:</b>	
<b>Related Material:</b>	PCA 2023-24 Stipend Chart_Rev 06.28.2023_Redlined 08.08.2023.pdf

**Pacific Coast Academy  
2023-2024 – Stipend Chart**

Stipend	Amount	Description	Eligibility Start	Method of Payment	Base Number of Students
<b>Administrative Support</b>	\$10,000	Assigned Position: Paid to a certificated teacher who applied and received the position.	Eligibility starts at the beginning of the school year.	Paid bimonthly over 10 months; August - May. Will be prorated based on period of service during the school year.	N/A
<b>Career Technical Education (CTE)</b>	\$5,000	Paid to CTE credentialed teachers who applied and received the position to be on the team.	Eligibility starts at the beginning of the school year or whenever job duties begin, whichever is later.	Paid bimonthly over 10 months; August - May. Will be prorated based on period of service during the school year.	N/A
<b>CHYA</b>	\$2,500	Assigned Position: Paid to a certificated teacher to provide office hours and instruction/support with CHYA curriculum.	Eligibility is earned after service has been completed from start date to end date.	Paid as a lump sum after completion of the work.	28
<b>Counselor Extra Section</b>	\$450 per week for each section of counseling coverage over 3 sections.	Provided to school counselors with a PPS who serve an extra section of students as school counselor.	Eligibility starts at the beginning of the school year and once counseling services begin.	Paid bimonthly over 10 months of the student calendar. Will be prorated based on period of service during the school year.	3 sections, additional pay begins on 4 <sup>th</sup> section
<b>Counselor - Pupil Personnel Services (PPS) Extra Duties</b>	\$8,500	Paid to PPS credentialed teachers who applied and received the position to be on the team.	Eligibility starts at the beginning of the school year or whenever job duties begin, whichever is later.	Paid bimonthly over 10 months; August - May. Will be prorated based on period of service during the school year.	N/A
<b>Elevate Lead Teacher</b>	\$6,000	Assigned Position: Paid to a certificated teacher who facilitates online instruction and regular events for the Elevate Program.	Eligibility starts at the beginning of the school year.	Paid bimonthly over 10 months; August - May. Will be prorated based on period of service during the school year.	28



**Pacific Coast Academy  
2023-2024 – Stipend Chart**

Stipend	Amount	Description	Eligibility Start	Method of Payment	Base Number of Students
<b>Elevate Lead Teacher Summer</b>	\$300	Assigned Position: Paid to certificated teachers (12) who will develop and plan the Elevate program for the start of the school year.	Eligibility starts at the beginning of June.	Paid bimonthly for the month of June.	N/A
<b>Extended School Year (ESY)</b>	\$3,500	Paid to special education teachers who provide services during ESY.	Eligibility is earned after service has been completed from start date to end date.	Paid in 2 installments during each of the 2 pay periods of ESY.	N/A
<b>Extra Student</b>	\$100/month/ student for any student after the designated amount.	If the Executive Director assigns additional students to the employee's roster over the designated amount, the employee will be compensated for those students.	Eligibility starts once the HST is full-time, and students are assigned at the Executive Director's discretion. Roster numbers are pulled bimonthly. Extra pay starts on or after 7/15 with a fully executed Master Agreement.	Paid bimonthly over the course of the student days of attendance. Will be prorated based on period of service during the school year.	Designated Amount HST: 28 RC: 16 High School RC: 10 Intervention/ELD: 28 Director of Professional Dev & Data: 10
<b>High School Academic Support Coordinator</b>	\$15,000	Assigned Position: Paid to a credentialed teacher who applied and received the position to be a lead for the team.	Eligibility starts at the beginning of the school year.	Paid bimonthly over 12 months; July - June. Will be not prorated. It is a set amount regardless of when hired for the position.	28
<b>Highly Qualified Teacher Extra Course</b>	\$450/pay period for each section of Edgenuity coverage and \$670/pay period for each section of ChoicePlus Academy coverage after 5 sections.	Provided to single subject credentialed teachers who teach additional coursework beyond a full load in ChoicePlus Academy or Edgenuity programs.	Eligibility once the teacher begins teaching the additional section.	Paid bimonthly over 10 months of the student calendar.	5 Sections, additional pay begins for 6th section.
<b>Highly Qualified Teacher Summer School Content</b>	<del>\$31.00/hour</del> \$32.24/hour	Provided to single subject credentialed teachers who teach additional coursework for high school summer school courses.	Eligibility starts at the beginning of June.	Paid bimonthly over 2 months; June - July. Will be prorated based on period of service during the school year.	N/A

**Pacific Coast Academy**  
**2023-2024 – Stipend Chart**

Stipend	Amount	Description	Eligibility Start	Method of Payment	Base Number of Students
HST Summer School	<del>\$31.00/hour</del> \$32.24/hour	Provided to credentialed teachers who teach additional coursework for high school summer school courses.	Eligibility starts at the beginning of June.	Paid bimonthly over 2 months; June - July. Will be prorated based on period of service during the school year.	N/A
Induction Coach	\$2,000	Paid to credentialed teachers who work with teachers who are working toward clearing their credential. Suggested two year commitment.	Eligibility starts at the beginning of the school year or whenever job duties begin, whichever is later.	<del>10</del> 9 months; <del>August</del> September - May. Will be prorated based on period of service during the school year.	N/A
Lead Teacher Summer	\$43.00 per hour	Paid to certificated teachers in lead positions who will help develop and plan their respective program(s) for the start of the school year.	Eligibility starts during the beginning of June.	Paid bimonthly for the month of June.	N/A
Library Specialist Team Lead	\$7,800	This position is open to current PCA Library Specialists.	Eligibility begins immediately.	Paid \$325 bimonthly over 12 months; July - June.	N/A
Medical Benefit Opt-Out	\$5,000	Provided to staff who opt out of medical benefit coverage.	Eligibility starts at the beginning of the school year.	\$208.33 paid bimonthly over 12 months; July - June. Will be prorated based on period of service during the school year.	N/A
Mileage	\$2,500 per year	Certificated employees who carry a roster and must travel to student monthly meetings.	Eligibility starts at the beginning of the school year and once the teaching begins.	Paid bimonthly over 10 months; August - May. Will be prorated based on period of service during the school year.	N/A

**Pacific Coast Academy**  
**2023-2024 – Stipend Chart**

Stipend	Amount	Description	Eligibility Start	Method of Payment	Base Number of Students
Occupational Therapist Extended School Year	\$3,500	Paid to Occupational Therapists assigned to provide services during the extended school year.	Eligibility is earned after service has been completed from start date to end date.	Paid in 2 installments during each of the 2 pay periods of the extended school year.	N/A
Online Teacher Sub	\$32.24/hour with a total of 2 hours expected	Assigned Position: Paid to a designated HST who volunteered and received the position.	Eligibility starts upon covering an online class as a substitute.	Paid the following paycheck after work and hours are submitted.	N/A
PCA Parent Partner Workshops	\$350 per workshop	Paid to HSTs who sign up to present on an approved topic to parents during a PCA Parent Partners workshop.	Eligibility starts at the beginning of the school year.	Paid as a lump sum, following the workshop, and aligning with the pay periods for HR.	N/A
PCA Presents: New Presentations	\$500 per presentation, max \$2000 per staff member	Paid to staff members who create and present PD to peers.	Eligibility starts at the beginning of the school year.	Paid as a lump sum at the end of each semester.	N/A
PCA Presents: Repeat Presentations	\$250 per presentation; max \$500 per staff member	Paid to staff members who create and present a previously presented PD to peers.	Eligibility starts at the beginning of the school year.	Paid as a lump sum at the end of each semester.	N/A
PCA Presents: Teacher Participation	\$40 per session for any additional sessions attended beyond the requirement.	Paid to staff members who attend additional PD sessions beyond the requirement.	Eligibility starts at the beginning of the school year.	Paid as a lump sum, following the workshop, and aligning with the pay periods for HR.	Will be determined each semester.

**Pacific Coast Academy**  
**2023-2024 – Stipend Chart**

Stipend	Amount	Description	Eligibility Start	Method of Payment	Base Number of Students
Phone/ Internet/ Utilities	\$956.16	Provided to all employees for work expense, including phone, internet, and utilities costs.	For all current employees. Eligibility starts at the beginning of the school year paid bimonthly July - June.	\$39.84 paid bimonthly over July - June. Will be prorated based on period of service during the school year. Payments will align with the employee's work calendar.	N/A
Professional Development Course	\$250 per staff member	Paid to staff members who participate in and complete the assigned Stanford Online Continuing Education Course.	Eligibility starts at the beginning of the school year.	Paid as a lump sum at the end of the school year upon submission of certificate of completion.	N/A
Robotics Teacher (Competition Team)	\$15,000	Assigned Position: Paid to a designated HST who applied and received the position to provide Robotics instruction for the Robotics team.	Eligibility starts at the beginning of the school year and once the teaching begins.	Paid bimonthly over 10 months; August - May. Will be prorated based on period of service during the school year.	28
Spark Student Enrollment Stipend (K-2nd grade classes)	\$1,500/semester: average enrollment of 16-22 students per class per semester; \$3,000/semester: average enrollment of 23+ students per class per semester	Assigned position: paid to a designated HST who applied and received the position to facilitate online instruction for the Spark program.	Eligibility starts at the beginning of the school year and once the teaching begins.	Paid as a lump sum at the end of each semester taught.	28
Spark Student Enrollment (3rd-8th grade classes)	\$1,500/semester: average enrollment of 15-25 students per class per semester; \$3,000/semester: average enrollment of 26+ students per class per semester	Assigned position: paid to a designated HST who applied and received the position to facilitate online instruction for the Spark program.	Eligibility starts at the beginning of the school year and once the teaching begins.	Paid as a lump sum at the end of each semester taught.	28
Spark Lead Teacher	\$6,000	Assigned Position: Paid to a certificated teacher who facilitates online instruction and regular events for the Spark Program.	Eligibility starts at the beginning of the school year.	Paid bimonthly over 10 months; August - May. Will be prorated based on period of service during the school year.	28

**Pacific Coast Academy  
2023-2024 – Stipend Chart**

Stipend	Amount	Description	Eligibility Start	Method of Payment	Base Number of Students
<b>Spark Teacher</b>	\$3,000 per semester	Assigned Position: Paid to a designated HST who applied and received the position to facilitate online instruction for the Spark Program.	Eligibility starts at the beginning of the school year and once the teaching begins.	Paid bimonthly over 10 months; August - May. Will be prorated based on period of service during the school year.	28
<b>School Support Lead</b>	\$6,000	Assigned Position: Paid to a credentialed teacher who applied and received the position to be the lead for their RC team.	Eligibility starts at the beginning of the school year.	Paid bimonthly over 10 months; August-May. Will be prorated based on period of service during the school year.	28
<b>SPED Assessment Team Overage</b>	\$150 per additional assessment	Education specialists completing more than 15 assessments per month will be provided \$150 for each additional assessment.	Stipend is earned after the IEP meeting is held.	Paid as lump sum after completion of the work.	15
<b>SPED Extra Hours Work</b>	\$310 for each period of assigned make-up work.	School staff will work with students in Special Education when necessary (ex. make-up services, compensatory services, etc.) in addition to staff's regular hours.	Eligibility starts at the beginning of the school year.	Paid as lump sum after completion of the work.	N/A
<b>SPED Extra Student Teacher</b>	Mild/Moderate \$150/month per extra student. Moderate/Severe \$400/month per extra student	If the Special Education Director assigns additional students to the employee's full-time caseload, the employee will receive \$150/month per student in the Mild/Moderate program, \$400/month per student in the Moderate/Severe program.	Eligibility starts once rosters surpass required roster limits.	Paid bimonthly over 10 months; August - May.	Mild/Mod 22 Mod/Severe 9
<b>SPED In-Person Services Teacher</b>	Up to .25 in-person (10 hours per week) = \$1,500 Up to .5 in-person (20 hours per week) = \$3,000 Up to .75 in-person (30 hours per week) = \$4,500 Up to 1.0 in-person (40 hours per week) = \$6,000	Assigned position for Education Specialists. Must provide services to identified student(s) in-person.	Stipend to begin first full pay period following board approval.	Paid bimonthly over 10 months; August-May. Will be prorated based on period of service during the school year.	N/A

**Pacific Coast Academy  
2023-2024 – Stipend Chart**

Stipend	Amount	Description	Eligibility Start	Method of Payment	Base Number of Students
<b>SPED Lead Extended School Year (ESY) Teacher</b>	\$1,000	Lead ESY teacher is responsible for organizing various components of ESY program and managing day to day operations during ESY	Stipend is earned after completion of ESY	Paid as lump sum after completion of the work	N/A
<b>SPED Lead Teacher</b>	\$1,000	Assigned Position: Must be in a leadership role and an authority in compliance, training, and support in the field of special education.	Eligibility starts at the beginning of the school year.	Paid bimonthly over 10 months of the student calendar. Will be prorated based on period of service during the school year.	N/A
<b>SPED Training/ Planning</b>	\$300 per each day of training	With Director pre-approval, staff involved in full day mandatory training or meetings outside regular work hours will receive this stipend.	Eligibility is earned after training has been completed.	Paid as lump sum after completion of the work.	N/A
<b>Speech Pathologist Extended School Year</b>	\$3,500	Paid to Speech Pathologists assigned to provide services during the extended school year.	Eligibility is earned after service has been completed from start date to end date.	Paid in 2 installments during each of the 2 pay periods of the extended school year.	N/A
<b>Speech Pathologist Lead</b>	\$1,000	Assigned Position: Must be in a leadership role and an authority in compliance, training, and support in the field of speech pathology.	Eligibility Starts at the beginning of the employee's first workday.	Paid bimonthly over 10 months of the student calendar. Will be prorated based on the period of service during the school year.	N/A
<b>Testing Team Lead</b>	\$6,000	Assigned Position: Paid to a credentialed teacher who applied and received the position to be the lead for their RC team.	Eligibility starts at the beginning of the school year.	Paid bimonthly over 10 months; August-May. Will be prorated based on period of service during the school year.	28

**Pacific Coast Academy**  
**2023-2024 – Stipend Chart**

Stipend	Amount	Description	Eligibility Start	Method of Payment	Base Number of Students
TK ECE Cohort Completion	\$2,000	Paid to HSTs upon completion of the Early Childhood Education 12-unit course sequence with the cohort through UCLA Extension and the assigned TK work duties (TK Park Days, TK Parent and Teacher Workshops, TK Resource Website).	Eligibility is earned after course sequence and assigned work has been completed.	Paid as lump sum after completion of work.	N/A

# Coversheet

## EL Master Plan

<b>Section:</b>	V. Consent Agenda
<b>Item:</b>	D. EL Master Plan
<b>Purpose:</b>	
<b>Submitted by:</b>	
<b>Related Material:</b>	PCA 2022-2023 EL Master Plan_Rev 9.15.2022_Redlined 08.07.2023.pdf





Pacific Coast Academy

# English Learner Master Plan

~~2022-2023~~ 2023-2024

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## MASTER PLAN FOR SERVICES TO ENGLISH LEARNERS ~~2022-2023~~

Pacific Coast Academy aims for outstanding programs for all our students. English Learners have enormous challenges but also have the opportunity to develop the asset of bilingualism within a global community. They face the double task of learning the challenging state standards and mastering a new language.

To ensure we reach optimal results for English Learners, we developed this Master Plan, and have aligned it with the four principles of the CA English Learner Roadmap. Doing so will ensure that our ELs learn English, have full access to a challenging academic curriculum, and build the multicultural proficiency necessary in today's complex and challenging world. This plan is a practical guide for all staff to ensure that we provide consistent, coherent services to each and every English Learner in our school.

This plan describes how we identify, serve, and support students who enroll in our school with limited proficiency in the English language. The plan sets forth six goals for this work:

- English Learner (EL) programs will be fully implemented.
- Parents of English Learners and Reclassified Fluent English Proficient Students (RFEPs) will participate meaningfully in their children's education.
- English Learners will master the English language as efficiently and effectively as possible.
- English Learners will achieve academic success comparable to English Only (EO) students.
- English Learners and Reclassified Fluent English Proficient Students will be at no greater risk for school failure than English Only Students.
- Hold regular Multilingual Learners Advisory Committee meetings to foster a better involvement of EL parents, thereby increasing the academic achievement of the EL population, advise the School Board, Executive Director, and EL Coordinator, on issues pertaining to English Learners, assist in the development of the school's needs assessment and Language Census Report, and provide input on formal school plans, such as WASC self-study and LCAP.

## ENGLISH LEARNER ROADMAP

The EL Roadmap is a new policy, established in 2017 to supersede Prop. 227. This statewide policy is meant to provide a common mission and vision for all CA schools and a roadmap on how to get there. It consists of 4 research based principles:

Principle 1: Assets-Oriented and Needs-Responsive

Principle 2: Intellectual Quality of Instruction and Meaningful Access

Principle 3: System Conditions that Support Effectiveness

Principle 4: Alignment and Articulation Within and Across Systems

## PCA EL MISSION AND VISION

While the state provides a Mission and Vision statement for all schools, Pacific Coast will be working with the MLAC to create a more personalized statement for our school. ~~This will be forthcoming in the 2022-2023 school year.~~

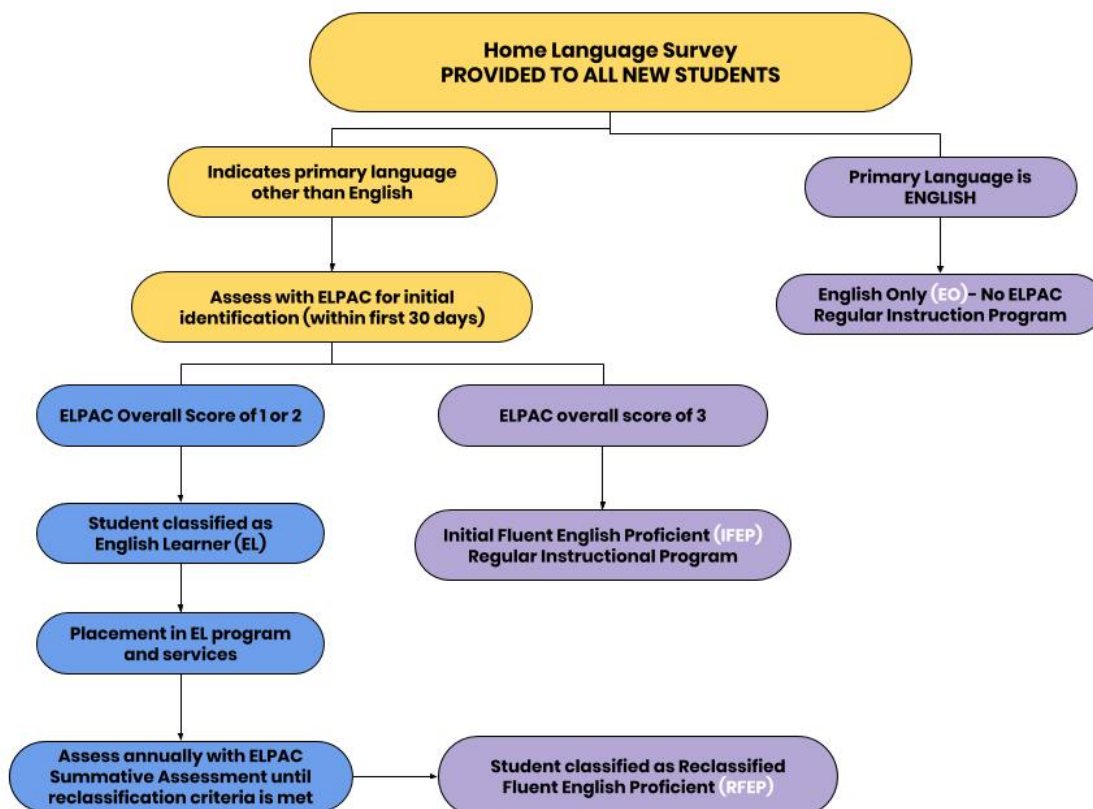
## GUIDING PRINCIPLES OF OUR EL PROGRAM

- English Learners (ELs) are held to the same high expectations of learning as all students, and therefore have equal access to the same rigorous academic content that enables them to meet performance standards in all content areas.
- ELs will develop English proficiency in the domains of listening, speaking, reading & writing through daily Designated and Integrated ELD instruction.
- PCA EL department focuses on the whole child, provides targeted academic and social-emotional support when needed, and honors and respects the student's home culture and language.

The academic success of ELs is a shared responsibility that leverages the skills and support of HSTs, the school, and the family.

## IDENTIFICATION TOOLS

- Home Language Survey upon enrollment
- Additionally, look in CALPADS and cumulative folders



## STEP 1: REGISTRATION, INCLUDING COMPLETION OF THE HOME LANGUAGE SURVEY

Upon enrollment, parents complete a Home Language Survey or HLS as required by state law. This survey is completed the first time the parent enrolls the child in Pacific Coast Academy. The results are maintained thereafter in the charter school's student information system and the English Learner folder in the child's cumulative record (CUM).

If the answers to Items 1, 2, 3 on the HLS are "English," the child is classified as English Only or EO. The parent is notified of the result and is given an explanation of the placement options open to the student. The default option is Mainstream English.

If Item 1, 2, or 3 on the Home Language Survey is answered with a language other than English or ASL, the child is tested for English proficiency. (Continue to Step 2)

However, if the parent's response to the first three questions on the HLS is English, and the response to the fourth question is other than English, then reasonable doubt may exist as to the student's home language. If there is evidence of significant non-English exposure, then the pupil must be administered the state English language proficiency assessment, currently known as the English Language Proficiency Assessments for California (ELPAC). The parent will be consulted by a certificated staff member regarding the need to administer the assessment, the results, and the subsequent program placement of the child.

**NOTE:** When reasonable doubt is established, the school must annotate the HLS to document the reasons for ELPAC administration. The school administrator/designee must sign and date the annotations provided.

The parent has the right to amend the HLS at any time. However, if the student has already been administered the initial ELPAC, any changes to the HLS will not affect the student's official language classification. If the parent amends the HLS prior to initial ELPAC administration, the school must honor the changes made while continuing to take reasonable doubt into consideration, given the probable impact of the change relative to the parent's or student's observed linguistic behavior.

Parents who enroll their child in Pre-Kindergarten must complete the HLS as part of the enrollment process. The first HLS (e.g., Pre-K) on file for a student supersedes all HLS forms completed at later times. Therefore, the answers provided on the **initial** HLS are documented permanently in CALPADS.

### Assessment

Assessment		
Initial ELPAC	Within 30 days of enrollment	July 1 – May 30
Initial ELPAC score report and Notification Letter will be mailed after testing. See Appendix		
Summative ELPAC	Given to current EL students	Feb 1 – May 30

## STEP 2: ENGLISH LANGUAGE PROFICIENCY ASSESSMENT

State regulations require that if the student's Home Language Survey indicates that a language other than English is used at home in Item 1, 2, 3, or 4 the student's English language proficiency level must be assessed within 30 calendar days of initial enrollment.

The ELPAC is a standardized language proficiency test designed to measure the English proficiency of non-native speakers in four domains: Listening, Speaking, Reading, and Writing. The child receives a score for each part of the test that is taken (Listening, Speaking, Reading, and Writing) as well as an overall score. The score types include scale scores and proficiency levels.

Effective November 2020, the initial ELPAC will be a computer-based assessment. The official score report is generated by the Test Operations Management System (TOMS) and are readily available once the student has completed all sections of the test. The official results are sent to the parent within 30 days of receipt by the school, along with the Initial ELPAC Notification Letter (see Appendix). ELPAC results are then also maintained in the school's student information system for future use in the monitoring of student progress and in the program evaluation.

~~If an Individual Education Plan (IEP) team has determined that a student is unable to take all or part of the ELPAC, the student will be given the Alternate ELPAC Assessment. The Individual Education Plan (IEP) will determine if the Alternate or General ELPAC is appropriate for the student.~~

The School will annually assess the ELP and academic progress of each English learner. The School shall administer the ELPAC summative assessment during the annual summative assessment window.

When administering an initial or summative ELPAC assessment to a pupil with a disability, the School shall provide designated supports or accommodations in accordance with the student's individualized education plan (IEP) or Section 504 plan. ~~When a student's IEP or Section 504 plan specifies that the student has a disability that precludes assessment such that there are no appropriate accommodations for assessment in one or more of the listening, speaking, reading, and writing domains, the student shall be assessed in the remaining domains in which it is possible to assess the student.~~

~~When a student's IEP team determines that the student has a significant cognitive disability such that the student is unable to participate in the initial or summative assessment or a Section of either test, even with resources, the student shall be assessed as specified in the student's IEP.~~

On the basis of the English language assessment, students are classified as either English Learner (EL) or Initially Fluent English Proficient (IFEP).

### Criteria for reasonable fluency in English

Level	Description
<b>Initial Fluent English Proficient [IFEP]</b>	Students at this level have <b>well developed</b> oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways that are appropriate to different tasks, purposes, and audiences in a variety of social and academic contexts. They may need occasional linguistic support to engage in familiar social and academic

	contexts; they may need light support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the “Bridging” proficiency level as described in the 2012 <i>California English Language Development Standards, Kindergarten Through Grade Twelve (2012 ELD Standards)</i> .
<b>Intermediate English Learner</b>	Students at this level have <b>somewhat developed</b> to <b>moderately developed</b> oral (listening and speaking) and written (reading and writing) skills. This level captures a broad range of English learners, from those who can use English only to meet immediate communication, needs to those who can, at times, use English to learn and communicate in meaningful ways in a range of topics and content areas. They may need some degree of linguistic support to engage in familiar social and academic contexts (depending on the student, the level of support needed may be moderate, light, or minimal); they may need substantial-to-moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the entire “Expanding” proficiency level and to the lower range of the “Bridging” proficiency level as described in the 2012 <i>ELD Standards</i> .
<b>Novice English Learner</b>	Students at this level have <b>minimally developed</b> oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts; they need substantial linguistic support to communicate on less familiar tasks and topics. This test performance level corresponds to the “Emerging” proficiency level as described in the 2012 <i>ELD Standards</i> .

**NOTE:** Students classified as IFEP are not eligible to receive EL services and will receive grade-level instruction in an instructional program designed for Native-English and Fluent-English speakers.

**IFEP Students** - The parents of IFEP students are informed of the results and given the same program options as those given EO students- the default program is Mainstream English. Placement is made on the same basis as for EOs.

**English Learners** proceed to primary language assessment. Parents of ELs will be notified each year of their child’s current language classification along with the annual assessment results. A student will remain an EL until he or she has met the criteria for reclassification.

### Parent Notification

- Results of assessments
- Student Placement

## STEP 3: PARENT NOTIFICATION OF RESULTS

### Parent Notification of Initial Assessment Results and Program Placement

Parents of students (ELs and IFEPs) who are administered the **initial** ELPAC will receive an official notification informing them of their child’s:

- Initial English language proficiency level and how it was assessed



- Official language classification
- Instructional program placement

In addition to the above, parents must also receive information regarding the:

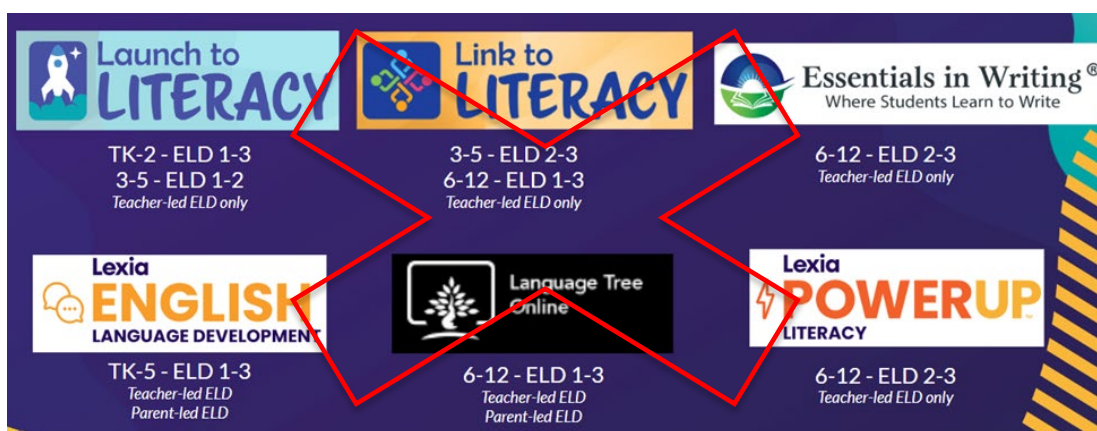
- Various instructional program options, educational strategies, and educational materials to be used in each program
- Reclassification, or program exit, criteria
- Instructional program for ELs with a disability (with an IEP) and how such a program will meet the objectives of the IEP
- Expected rate of graduation for ELs

## Parent Notification of Annual Assessment Results and Program Placement

### Program Placement/Instructional

- **English Language Mainstream (ELM)**—A classroom setting for English learners who have acquired reasonable fluency in English, as defined by the charter school. In addition to ELD instruction, English learners continue to receive additional and appropriate educational services in order to recoup any academic deficits that may have been incurred in other areas of the core curriculum as a result of language barriers.
- Core Instruction in English
- All EL students will be enrolled in an ELD class, based on their EL level. The purpose of this class is to provide Designated ELD (D-ELD) Instruction. This requirement can be met either through the virtual, teacher led ELD class or independently at home through curriculum access provided by the school. In either case, the ELD log will be required to show that the instruction is occurring daily, for a minimum of 30 minutes per day. The log will serve as the work sample for this class.
- SDAIE strategies/vocabulary development will be embedded in the curriculum and enhanced with teacher support in person or online sessions. (SDAIE Strategies for English Learner Intervention is attached).
- Monitor student progress and evaluate program regularly.
- BrainPOP ELL- brings English language learning to life in your classroom! BrainPOP ELL explores this rich collection of support resources, from ELL-specific graphic organizers and action images to learning strategies, lesson plans, vocabulary activities, and more proficiency-based English language learning program appropriate for all ages, at no cost to students.
- MobyMax- creates digital curriculum, assessments, and learning tools for teachers and students in grades K-8.
- In addition, any other school-provided online programs, such as **Lexia Core 5 or Lexia Power Up Lexia-English**, **ELPAC Practice Workbooks**, **Essential in Writing Workbooks**, and **Learning Ally**, and **Language-Tree Online**, used in the virtual ELD class or as online licenses/access to the student.

All EL students receive access to the following curriculum:



Please [click here](#) for more information on the school provided curriculum.

### Option 1 - ELD Teacher Led **\*\*Recommended\*\***

#### Classes based on EL level (ELPAC overall score)

- 2 days per week: ELD Support Classes 2x per week (30-45 min depending upon grade level)
- 3 days per week: Independent ELD based on curriculum used in the class with assignment and follow up by the ELD Teacher
- Curriculum used
  - Grades TK-5 - Launch to Literacy
  - Grades 6-12 - Link to Literacy, Essentials in Writing, PowerUp

#### For all Teacher Led courses the ELD Teacher will provide the following:

- Monthly information for AWR
- Grades each semester
- **Online Curriculum Usage Report**

#### Parent will provide the following to HST:

- Work sample for each LP ~~(ELD Log)~~ (**Online Curriculum Usage Report & Written Sample**)

**Option 2 - Parent Led (Levels determined by ELPAC Score)****All levels:**

- Parent responsible for providing ELD Instruction at least 30 minutes per day
- Parent provides HST with ~~ELD log sheet monthly~~ **Online Curriculum Usage Report** to document ELD instruction and to serve as a work sample
- HST works with family to monitor and verify that D-ELD is occurring
- Curriculum:
  - TK-5: ~~Lexia-English~~ **Lexia Core 5**
  - 6-12: ~~Language-Tree-Online~~ **Lexia Core 5 or Lexia Power Up**
    - Parent also has the option of choosing an entirely different curriculum, as long as it is aligned to the ELD Standards. It must also be **separate and in addition** to their core language arts curriculum

**For all Parent Led courses the Parent will provide and/or collaborate on the following with the HST:**

- Monthly information for AWR
- Grades each semester
- Work sample for each LP ~~(ELD Log)~~ **(Online Curriculum Usage Report & Written Sample)**

**STEP 4: PROGRAM PLACEMENT**

The following process is used to identify the most appropriate program for the English Learner. ELPAC results indicate whether the student is *reasonably fluent in English* or not.

The criteria for reasonable fluency in English are the same as the ELPAC Performance Level Descriptors. They include:

- Student's *overall* proficiency level is moderately developed or higher, *and*
- Proficiency in *each* domain area is somewhat developed or higher. The skill areas are Listening, Speaking, Reading, and Writing (Kindergarten through 12th grade).

If the child is *reasonably fluent in English* by these criteria, then the default placement is the *mainstream English program*. Additional support services may be recommended, as appropriate. The child will normally continue in this placement until reclassified. Support services in the mainstream program must include English Language Development and may include one or more of the following:

- Content instruction using SDAIE strategies
- Specialized instruction by an English Learner Development teacher
- Participation in Benchmark, Strategic, or Intensive interventions in a variety of setting based on student need

**ELPAC Performance Level & ELD Standards Proficiency Level Descriptors**

<b>ELPAC Performance Level</b>	<b>Level 1:</b>  <b>Minimally Developed</b>	<b>Level 2:</b>  <b>Somewhat Developed</b>	<b>Level 3:</b>  <b>Moderately Developed</b>	<b>Level 4:</b>  <b>Well Developed</b>
	English learners at this level have <b>minimally developed</b> oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level.	English learners at this level have <b>somewhat developed</b> oral (listening and speaking) and written (reading and writing) skills. They can use English to meet immediate communication needs but often are not able to use English to learn and communicate on topics and content areas.	English learners at this level have <b>moderately developed</b> oral (listening and speaking) and written (reading and writing) skills. They can sometimes use English to learn and communicate in meaningful ways in a range of topics and content areas.	English learners at this level have <b>well-developed</b> oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways that are appropriate to different tasks, purposes, and audiences in a variety of social and academic contexts.
<b>ELD Standards Proficiency Levels</b>	<b>Emerging</b>	<b>Expanding</b>		<b>Bridging</b>
	Students at this level typically progress very quickly, learning to use English for immediate needs as well as beginning to understand and use academic vocabulary and other features of academic language	Students at this level are challenged to increase their English skills in more contexts and learn a greater variety of vocabulary and linguistic structures, applying their growing language skills in more sophisticated ways that are appropriate to their age and grade level.		Students at this level continue to learn and apply a range of high level English language skills in a wide variety of contexts, including comprehension and production of highly technical texts. The "bridge" alluded to is the transition to full engagement in grade-level academic tasks and activities in a variety of content areas without the need for specialized ELD instruction. However, ELs at all levels of English language proficiency fully participate in grade-level tasks in all content areas with varying degrees of scaffolding in order to develop both content knowledge and English.
<b>Level of Support</b>	<b>Substantial</b>	<b>Moderate</b>		<b>Light</b>
	Students at the <i>early stages</i> of the Emerging level can engage in complex, cognitively demanding social and academic activities requiring language when provided substantial linguistic support; as they develop more familiarity and ease with understanding and using English, support may be moderate or light for	Students at the <i>early stages</i> of the Expanding level can engage in complex, cognitively demanding social and academic activities requiring language when provided moderate linguistic support; as they develop increasing ease with understanding and using English in a variety of contexts, support may be light for familiar tasks or topics.		Students at the <i>early stages</i> of the Bridging level can engage in complex, cognitively demanding social and academic activities requiring language when provided light linguistic support; as they develop increasing ease with understanding and using highly technical English, support may not be necessary for familiar tasks or topics using everyday English.

	familiar tasks or topics.		
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Reference Chart		
English Learner Student Typologies		
Typology	Key Characteristics	Considerations
<b>Newcomers</b>	<ul style="list-style-type: none"> <li>In U.S. three years or less</li> <li>Little or no English language proficiency on arrival</li> <li>Some well-prepared in native language, on grade level, others are below</li> <li>Some arrive with many transferable credits, others with no transcript records</li> <li>Steady progress through ELS sequence</li> <li>If school offers native-language content courses, credit accrual toward graduation can be rapid</li> <li>Difficulty passing CAHSEE within four-year time frame</li> <li>Academic achievement in terms of grades similar to rest of the school</li> <li>Facing cultural transition</li> </ul>	<ul style="list-style-type: none"> <li>Special orientation and transitional classes</li> <li>Newcomer class or program</li> <li>High quality literacy-focused English Language Development curriculum</li> <li>Extended time through a five or six-year high school program</li> <li>Home language academic content classes</li> <li>Deliberate instruction within context of content to learn: How English Works and become proficient in using it</li> <li>Direct Instruction for Language to Access/Comprehend</li> <li>Direct Instruction for Language to Participate/Activities, Tasks, and Processes of Learning</li> </ul>
<b>Well-Educated Newcomer Students</b>	<ul style="list-style-type: none"> <li>In U.S. three years or less</li> <li>Schooling in native country usually excellent</li> <li>Strong literacy skills in home language</li> <li>Rapid movement through ESL sequence</li> <li>Academic achievement in terms of grades exceeds rest of school</li> <li>Often highly motivated</li> <li>Good possibility of graduating in four years</li> </ul>	<ul style="list-style-type: none"> <li>Should not be placed in academic content classes that stall or repeat content they already know</li> <li>High level academic course in home language should be offered where available</li> <li>Mainstream English classes with native language support materials and text</li> <li>If appropriate credit is given for coursework completed in the home country</li> <li>Deliberate instruction within context of content to learn: How English Works and become proficient in using it</li> <li>Direct Instruction for Language to Access/Comprehend</li> <li>Direct Instruction for Language to Participate/Activities, Tasks, and Processes of Learning</li> </ul>
<b>Under-Schooled</b>	<ul style="list-style-type: none"> <li>In U.S. several years or less</li> <li>Little to no English language or proficiency</li> <li>Little to no literacy in native language</li> <li>Schooling in native country interrupted, disjointed, inadequate, or no schooling at all</li> <li>Three or more years below grade level in Math</li> <li>Slow acquisition of English-tendency to repeat ESL level</li> <li>Tendency to struggle in academic content classes (D's and F's)</li> <li>Lack of credit accrual, over time</li> </ul>	<ul style="list-style-type: none"> <li>An intensity of approach and focus on English</li> <li>Extended time in high school with fifth and sixth year options</li> <li>Age appropriate materials/curriculum with content support</li> <li>Additional Content Support as needed</li> <li>Special orientation and transitional support</li> <li>Social/Emotional support</li> <li>Deliberate instruction within context of content to learn: How English Works and become proficient in using it</li> </ul>

	<ul style="list-style-type: none"> <li>Unable to pass CAHSEE</li> </ul>	<ul style="list-style-type: none"> <li>Direct Instruction for Language to Access/Comprehend</li> <li>Direct Instruction for Language to Participate/Activities, Tasks, and Processes of Learning</li> </ul>
<b>Long-Term Limited English Proficient</b>	<ul style="list-style-type: none"> <li>In U.S. 7+ years when entering high school</li> <li>Multiple countries of origin Usually orally fluent in English</li> <li>Reading/writing below level of native English peers Bi-modal academically; some doing well, others not</li> <li>Some have literacy in primary language, others not</li> <li>Some were in bilingual programs, most not</li> <li>Mismatch between student's own perception of academic achievement (high) and actual grades or test scores (low)</li> <li>Similar mismatch between perception of language ability and reality</li> </ul>	<ul style="list-style-type: none"> <li>Motivation and Engagement</li> <li>Academic Language</li> <li>Rigor</li> <li>Study Skills and Goal Setting</li> <li>Attention to Maximizing Graduation Credits and A-G requirements - Communication about credits from counselors and teachers</li> <li>LTEL class or program</li> <li>Deliberate instruction within context of content to learn: How English Works and become proficient in using it</li> <li>Direct Instruction for Language to Access/Comprehend</li> <li>Direct Instruction for Language to Participate/Activities, Tasks, and Processes of Learning</li> </ul>
<b>Over-Age for Grade Level</b>	<ul style="list-style-type: none"> <li>Turned 15 before their 9<sup>th</sup> grade year; turned 16 before their 10<sup>th</sup> grade year; turned 17 before their 11<sup>th</sup> grade year; turned 18 before their 12<sup>th</sup> grade year</li> <li>May have gaps in prior schooling or a history of school failure and in- grade retention</li> </ul>	<ul style="list-style-type: none"> <li>Motivation and Engagement</li> <li>Age appropriate materials/curriculum</li> <li>Special orientation and transitional support Social/Emotional support</li> <li>Attention to Maximizing Graduation Credits and A-G requirements - Communication about credits from counselors and teachers</li> <li>Deliberate instruction within context of content to learn: How English Works and become proficient in using it</li> <li>Direct Instruction for Language to Access/Comprehend</li> <li>Direct Instruction for Language to Participate/Activities, Tasks, and Processes of Learning</li> </ul>
<b>Fluent English Proficient, but Struggling Academically</b>	<ul style="list-style-type: none"> <li>Re-designated from limited English proficiency to fully proficient</li> <li>Receiving at least one D or F in core academic Classes</li> <li>Following re-designation, decline in grades and achievement</li> </ul>	<ul style="list-style-type: none"> <li>Focus on Reading Fluency through academic vocabulary</li> <li>Regular participation in Academic Talk/Conversations</li> <li>Attention to Maximizing Graduation Credits and A-G requirements - Communication about credits from counselors and teachers</li> <li>Deliberate instruction within context of content to learn: How English Works and become proficient in using it</li> <li>Direct Instruction for Language to Access/Comprehend</li> <li>Direct Instruction for Language to Participate/Activities, Tasks, and Processes of Learning</li> </ul>

This chart is based upon the typologies developed in Olsen, L. and Jaramillo, A. (1999) *Turning the Tides of Exclusion: A Guide for Educators*

*and Advocates of Immigrant Students. California Tomorrow: Oakland, CA.*

## STEP 5: PARENT ENGAGEMENT PLAN

The school makes every effort to engage parents and get them involved in their child's education. As such, a Parent Engagement Calendar of Events is created every year. It includes workshops for parents, informational meetings, and educational family events. The calendar is posted on the school's website, shared with families at the beginning of the year, flyers and information appears in the Family Newsletter, and families are invited to attend by their HSTs and the ELD department.

## BILITERACY RECOGNITION PROGRAM (BRP) AND STATE SEAL OF BILITERACY (SSB)

Though both of these programs are voluntary, PCA highly recommends them to our EL and RFEP students, as they both encourage and support multiliteracy. Through the use of these two programs, and in alignment with principles 1 and 4 of the EL Roadmap, PCA aims to:

- Recognize students who have demonstrated progress toward proficiency in reading, writing, listening, and speaking in one or more world languages in addition to English
- Honor and affirm students' home languages and cultures
- Value diversity
- Encourage a study of languages toward becoming multilingual
- Certify progress toward biliteracy

## AT PROMISE EL STUDENTS & LTELs (LONG TERM ENGLISH LEARNERS)

Pacific Coast Academy will annually run a list of the at-promise ELs (4-5 years as an EL) and our LTELs (6+ years as EL) and work with HSTs to strongly encourage the following supports:

- Virtual Reading Comprehension virtual classes offered by qualified instructors
- Lexia Core 5
- Lexia Power Up
- ~~Lexia English~~
- ~~Language Tree Online~~
- BrainPOP ELL
- Learning Ally
- Rosetta Stone English
- PCA's EL designee will collaborate with HSTs and parents to determine best practices to encourage and support each student to show English fluency and be able to reclassify

## ANNUAL EL AND SUMMATIVE ELPAC NOTIFICATION LETTER

In this combined letter, parents are notified annually of their child's continued status as an EL student,



whether their student is identified as Long Term English Learner (LTEL) or At Risk, and also of the requirement to participate in the summative ELPAC in the spring of that school year. The letter also lists ways the parent can help their child be more successful, as well as the PCA reclassification criteria and programs and supports offered. This letter is emailed to families within the first 30 days of each school year. (See Appendix)

## STAFFING

Per state and federal law, all teachers of our EL students hold a valid CA teaching credential with authorization to instruct English Learners. This CLAD or English Learner authorization is met through coursework completion or passing scores on the 3 CTEL examinations. EL students are not assigned to teachers who have not yet earned this authorization, or, as in the case of a new teacher, with a preliminary credential, who is still working to clear their credential. Pacific Coast Academy will:

- Ensure appropriate assignments of teachers for English Learners
- Assure that teachers hold proper California Teacher Credentialing (CTC) English Learner authorizations
- Provide information regarding approved programs and exam preparation to teachers who do not hold appropriate certification

## PROFESSIONAL DEVELOPMENT FOR STAFF AND ADMINISTRATORS ON INITIAL IDENTIFICATION, PLACEMENT, AND RELATED PARENTAL RIGHTS/INFORMED CONSENT

Pacific Coast Academy is committed to providing ongoing annual professional development for administrators and staff, including special education teachers and staff, on legal requirements and charter school procedures relating to the implementation of the identification and placement requirements of this *English Learner Master Plan*, including but not limited to:

- Initial identification
- Placement options and procedures
- Communicating assessment results to families effectively.
- Parental rights and informed consent regarding initial identification and placement, including the parental exception waiver option.

Those who must participate in the training include but are not limited to: administrators, teaching staff, counselors, staff members who work with ELs' student records, office staff members responsible for registration, special education teachers, paraprofessionals and specialists, and other support staff as necessary. The training places special emphasis on sensitivity to parents, including how to make parents feel welcome and how to ensure that they are truly informed and able to take an active role in the process of determining the appropriate instructional program for their child.

The professional development offered will be designed to improve the instruction and assessment of ELs; designed to enhance the ability of teachers, the Executive Director, and other school leaders to understand and implement curricula, assessment practices and measures and instructional strategies for



ELs; effective in increasing the student's English language proficiency or substantially increasing the teacher's subject matter knowledge, teaching knowledge and teaching skills, as demonstrated through classroom observation.

## INITIAL ELPAC-ELAS CORRECTION POLICY AND PROCESS

Local Educational Agencies are allowed to make one correction per student per lifetime to an English Language status. This process can be used if a parent/guardian or certificated employee of the LEA requests a review of the student's classification on the basis of the results of the Initial ELPAC. Typically, the process will be used if a parent/guardian or certificated employee can provide evidence that a student who was classified as English Learner (EL) after taking the Initial ELPAC should be classified as Initially Fluent English Proficient (IFEP). This process must occur before the first administration of the Summative ELPAC, starting in February.

If a student was tested with the initial ELPAC and was designated EL but, based on evidence and observation, you feel that they are proficient in English, the HST can request a status correction to IFEP (Initially Fluent English Proficient).

1. HST submits the Google Survey--ELAS Correction Request for Initial ELPAC; found in the EL Resources Folder.
2. If the request is approved for further review, HST will receive an Evidence Form and info sheet.
3. HST and family review the examples of possible evidence for the student's grade span.
4. HST and family gather appropriate, grade-level evidence in all domains to illustrate student's English Language Proficiency
5. Complete the Evidence Form, signed by HST and Parent, then email, along with evidence, to the school's EL Designee or coordinator.

## RECLASSIFICATION

Pacific Coast Academy reclassifies EL students to Reclassified English Fluent Proficient (RFEP) at the point when specialized language and academic support services are deemed no longer needed for ELs to be successful in their educational program at a level commensurate to non-ELs. This decision is made using criteria that include assessment of English language proficiency using the ELPAC, Smarter Balanced Assessment Consortium (SBAC) or California Alternative Assessment (CAA) scores in English-Language Arts, teacher evaluation, and parent consultation.

Once ELs are reclassified, they retain RFEP status for the rest of their educational careers. However, the academic progress of RFEP students must be monitored for a minimum of four years, as required by state and federal guidelines, and if their continued linguistic and academic performance declines or stalls, interventions are provided to ensure that these students reach and maintain grade-level academic proficiency. A full description of the reclassification process is detailed below.

ELPAC proficiency level, in addition, common, grade-level standards-based assessments, and English language development (ELD) assessments, are examined to determine if the student is able to function at a level commensurate with his or her English-speaking peers.

## RECLASSIFICATION POLICY, CRITERIA, AND PROCESS

The EL Designee or coordinator for Pacific Coast Academy will specifically evaluate students who are potentially qualified for reclassification. This will occur upon the release of ELPAC scores by the state.

Per the California Department of Education recommendations and requirements, EL Reclassification will be based on the following four criteria:

1. ELPAC Score - Students must have an Overall Performance Level score of 4 (the statewide standardized ELP criterion).
2. Teacher Evaluation - Student progress as observed by the teacher, as well as student's grades and progress on AWRs in English. A grade of C or higher is required. In the case of TK-8 students, their progress toward standard mastery must be Meeting or Exceeding Expectations.
3. Parent Opinion and Consultation - Parents will be consulted and invited to provide input and opinions on their child's readiness for reclassification.
4. English Language Proficiency - EL student's English language proficiency will be compared with that of an English Proficient Student. This will take the form of the STAR 360 Assessment and SBAC scores. The cut score requirements/criteria is indicated in the chart below.

Criterion 4			
Grade	SBAC (ELA) Performance Level	Minimum Reading Score on STAR360 (Unified Scale Score)	Star Early Literacy (Star Unified Scaled Score)
TK/K	N/A	690	730
1	N/A	742	789
2	N/A	875	N/A
3	Standard Nearly Met / <u>OR</u>	950	N/A
4	Standard Nearly Met / <u>OR</u>	992	N/A
5	Standard Nearly Met / <u>OR</u>	1021	N/A
6	Standard Nearly Met / <u>OR</u>	1050	N/A
7	Standard Nearly Met / <u>OR</u>	1069	N/A
8	Standard Nearly Met / <u>OR</u>	1088	N/A
9	N/A	1105	N/A
10	N/A	1117	N/A
11	Standard Nearly Met / <u>OR</u>	1124	N/A
12	N/A	1129	N/A

## PROCESS

1. The EL Designee or coordinator will complete the Reclassification Form for students who meet the first criteria. (See Appendix)
2. The Reclassification Form will then be sent to the teacher for further input and completion of grades, test scores, etc.
3. Parent opinion/feedback is gathered and entered on the form. They may also consult with the EL Designee or coordinator, and/or teacher regarding their child's reclassification.
4. At this point, if everyone is in agreement, the student is then redesignated RFEP. A Parent Notification Letter of Reclassification is mailed to the parents. (See Appendix)

5. If a student has not met criteria 1, 2, or 4, they will remain EL and will be reevaluated the next school year.

## RECLASSIFYING ENGLISH LEARNERS WITH DISABILITIES

In accordance with state guidelines, all students who are designated as EL must participate in the Summative ELPAC prior to being considered for reclassification. The reclassification criteria and the process is the same for Special Education students being considered for reclassification, except in those cases where the IEP team feels that the student's disability, more so than a language barrier, is the reason why the student is not qualifying for reclassification. In such cases, it is the responsibility of the IEP team, case carrier, or teacher to initiate contact with the EL Designee or coordinator to consider the alternative reclassification criteria and form. The IEP team, to include the parent and the EL Designee or coordinator, will discuss and complete the form. If the student is found to meet this criterion, he/she will then be reclassified to RFEP, and four-year monitoring will commence, as with all other RFEP students. (See Appendix)

## RFEP MONITORING

Per the California Department of Education requirements, once a student is reclassified as RFEP, they are no longer required to take the summative ELPAC, but there is a requirement for four years of continuous monitoring of that student. Pacific Coast Academy will monitor RFEPs once per year over the course of the four years, using our new EL monitoring platform, ELlevation.

If at any point, the student is scoring below grade level, intervention measures will be put in place so as to ensure that the student is receiving as much support as possible toward maintaining English language proficiency and academic growth.

In addition to the formal monitoring, there will be a minimum of three times per year that the EL coordinator works in tandem with the HST to monitor student progress. During these times, a review of the following will take place: core curriculum, specific curriculum for designated ELD, Star 360 scores, and any other intervention resources that the student might be utilizing.

Furthermore, HSTs are specifically monitoring EL student progress during their monthly LP meetings and then documenting in the Roster Checklist, which will be reviewed by the HST's Regional Coordinator and EL Coordinator, when appropriate.

## MULTILINGUAL LEARNERS ADVISORY COMMITTEE (MLAC)

Pacific Coast Academy maintains a functioning advisory committee primarily composed of representative parents or guardians of English learners.

Pacific Coast Academy is a single LEA charter school, Pacific Coast Academy will hold Multilingual Learners Advisory Committee meetings a minimum of 4 times per year. The schedule of meetings is posted on the school's website, shared with families at the beginning of the year, flyers and information appears in the Family Newsletter, and families are invited to attend by their HSTs and the ELD department.

## MULTILINGUAL LEARNERS ADVISORY COMMITTEE (MLAC) BYLAWS

### Article I: Name of Committee

The name of the committee shall be Pacific Coast Academy Multilingual Learners Advisory Committee (MLAC) or PCA MLAC.

### Article II: Purpose and Responsibilities

The purpose of the MLAC is to:

- Advise the School Board, Executive Director, and Director of ELD, on issues pertaining to English Learners (ELs)
- Foster a better involvement of EL parents, thereby increasing academic achievement of the EL population
- Assist in the development of the school's needs assessment
- Provide input on formal school plans, such as WASC self study and LCAP.

### Article III: Membership

- Members are elected by parents or guardians of English Learners
- Each member may serve for a one-year term and is entitled to one vote, when matters are voted upon
- Composition of the MLAC will constitute no less than 51% parents of EL students
- Site ELAC members will vote to select at least one member to serve on Multilingual Learners Advisory Committee (MLAC)

### Article IV: Officers

- Nominations for the two officer positions will be solicited at the first MLAC meeting of the school year.
- All Nominees will be added to a ballot, which will be voted on by members of the MLAC. As such, officers are elected by EL parents
- The Role of President shall:
  - Consult with parents and MLAC members to solicit feedback for topics of interest or need at future meetings
  - Collaborate with Executive Director or Director of ELD to plan meeting agendas
  - Opens meetings and welcomes members
  - Adjourns meetings and reminds committee of the date of next meeting
  - Hold the position for two years
- The Role of Vice-President shall:
  - Fill in for the president, in his/her absence
  - Read for approval of minutes from previous meeting
  - Hold the position for two years
- A member's membership in the MLAC ceases once they no longer have an EL student at the school, due to reclassification, graduation, or withdrawal.

- In case of officer vacancies, re-elections will be held.

### Article V: Meetings and Quorum

- Meetings will occur a minimum of five times per school year, to be held every other month.
- Meeting agendas will be posted on the school's website and are open to the public
- MLAC members will receive an email invite and reminder of the meeting, in addition to the posting.
- Meetings will still take place with less than 51%, a quorum, of the members present, but no official action or vote will be considered valid unless a quorum is met.

### Article VI: Ratification and Amendments of Bylaws

Bylaws will be ratified and adopted every two years when a quorum of the committee votes to adopt. In the event that an amendment is required, it too will be brought to the vote of the committee members and passed with a quorum, 51% vote.

## INITIAL ELPAC NOTIFICATION LETTER

To the parent(s)/guardian(s) of:

<<First Name>> <<Last Name>>

<<Address 1>>

<<Address 2>>

Student ID# <<SSID>>

Grade: <<Tested Grade>>

School: <<LEA Name>>

Test Date: <<Date Testing Completed>>

**Dear Parent(s) or Guardian(s):** A language other than English was noted on your child's Home Language Survey when your child first enrolled in our school. State and federal law requires us to assess your child and notify you of your child's proficiency level in English. We are required to inform you of the language acquisition program options available. From these options, you may choose the one that best suits your child (California *Education Code [EC]* Section 310). This letter also explains the criteria for a student to exit the English learner (EL) status (20 United States Code [U.S.C.] Section 6312[e][3][A][i],[vi]).

### Language Assessment Results (20 U.S.C Section 6312[e][3][A][ii])

Composite Domains	English Language Proficiency Assessments for California (ELPAC) Initial ELPAC Performance Level
<b>Overall</b>	Status: <<Overall Performance Level>> Score: <<Overall Score>>
Oral Language (Listening and Speaking)	<<Oral Level>>
Written Language (Reading and Writing)	<<Written Level>>

Based on the results of the English language proficiency assessment, your child has been identified as an <<Calculated ELAS>> student. Their Student Score Report can now be accessed electronically through your [parent portal in School Pathways](#).

### Program Placement

If your student was identified as **IFEP**, he/she is assigned to a regular academic program, will not need to participate in an English language instructional support program, will not be designated as an English Learner (EL student), nor will he/she need to take the ELPAC exam again. Please note that this does not change your student's homeschool teacher.

If your student was identified as an **English Learner (EL)**, he/she has been assigned to an appropriate English language instructional support program based on the results. The goal of this program is to help your child become proficient in English and succeed in the school's academic curriculum. Instructional support is added by your child's teacher as needed, according to the ELPAC results. Please note that this does not change your student's homeschool teacher.

### Exit (Reclassification) Criteria

The goal of language acquisition programs is for students to become proficient in English as rapidly as possible and to meet state academic achievement measures. This charter school's exit (reclassification) criteria are listed below. (20 U.S.C. Section 6312[e][3][A][vi])

Required Criteria (California Education Code [EC] Section 313[f])	LEA Criteria Pacific Coast Academy EL Master Plan
English Language Proficiency Assessment	ELPAC Overall Performance Level 4
Teacher Evaluation	Student progress as observed by a teacher, as well as student's grades/progress indicators in math and English. Grade must be a C or higher in both courses. Progress in standards must be Meeting or Exceeding Expectations.
Parental Opinion and Consultation	Parents will be invited to, and are strongly encouraged to participate in a phone conference, as noted in the Parent Notification Letter of Reclassification.
Comparison of Performance in Basic Skills	EL student's English language proficiency will be compared with that of an English Proficient Student. This will take the form of the STAR 360 Assessment and SBAC scores.

### Intervention and Support Option

In addition to the instructional support provided by your homeschool teacher, Pacific Coast Academy offers other programs to help your student with their English fluency and academic achievement goals. Below is a list of options, which you can discuss with your teacher, if interested.

All EL students receive access to the following curriculum:		
TK-4	5-8	9-12
<ul style="list-style-type: none"> <li>BrainPOP ELL (ELD - supplemental)</li> <li><del>Lexia English (ELD)</del></li> <li>Lexia Core 5</li> <li>Learning Ally</li> </ul>	<ul style="list-style-type: none"> <li>BrainPOP ELL (ELD - supplemental)</li> <li><del>Lexia English (ELD)</del></li> <li>Learning Ally (supplemental)</li> </ul>	<ul style="list-style-type: none"> <li><del>Language Tree Online (ELD)</del></li> <li>Lexia Power Up</li> <li>Learning Ally (supplemental)</li> <li>Shmoop (full curriculum)</li> </ul>

(supplemental) • MobyMax (supplemental)	• MobyMax (supplemental) • IXL (supplemental)	• IXL (supplemental)
--	--	----------------------

In addition to the above provided curriculum, we strongly recommend the **Virtual Teacher-led ELD Class**. It will provide a twice per week 45-minute session focused on designated EL instruction, with individualized support and instruction using other supplemental EL curriculum and materials taught by our ELD teacher. To sign up for this class, please ask your teacher to enroll your child.

Should you have questions regarding these programs, test results, or your child's instructional placement, please contact your child's teacher, or me, at the number or email listed below.

Sincerely,

Yolanda Osborne

Director of School Support

619-215-0704 x4165

~~(619) 993-0621~~ [yolanda.osborne@pacificcoastacademy.org](mailto:yolanda.osborne@pacificcoastacademy.org)

## ANNUAL ENGLISH LEARNER NOTIFICATION LETTER

Dear Parent(s) or Guardian(s) of <<First>>:

Each year, we are required by State and federal laws, to assess your child and notify you of your child's proficiency level in English. **Your child continues to be identified as an English learner.**

### Long Term English Learner (LTEL)/ At Risk of Becoming a Long Term English Learner (ARLTEL)

[AB 81](#) requires local educational agencies and charter schools to annually notify parents if their child is identified as a Long Term English Learner (LTEL) or At Risk of Becoming a Long Term English Learner (ARLTEL).

Your student is identified as (check if applicable):

- ☐ Long Term English Learner      ☐ At Risk of Becoming a Long Term English Learner

**Long-Term English Learner (LTEL):** An English learner (EL) student to which all of the following apply: (1) is enrolled in any of grades 6 to 12, inclusive; and (2) has been enrolled in a U.S. school for six years or more; and (3) has remained at the same English language proficiency level for two or more consecutive prior years, or has regressed to a lower English language proficiency level, as determined by the English Language Development test; and (4) for students in grades 6 to 9, inclusive, has scored at the "Standard Not Met" level on the prior year administration of the CAASPP-ELA. For more information see Education Code 313.1

**English Learner "At-Risk" of Becoming a Long-Term English Learner ("At-Risk"):** An English learner (EL) student to which all of the following apply: (1) is enrolled in grades 3 to 12, inclusive; and (2) has been enrolled in a U.S. school for four or five years; and (3) has scored at the intermediate level or below on the prior year's English language development test; and (4) has scored in the fourth or fifth year at the "Standard Not Met" level on the prior year administration of the CAASPP-ELA. For more information see Education Code 313.1

If your student is identified as LTEL or At Risk, above, we strongly suggest that you choose to meet the requirements of the Designated ELD instruction portion of their school day, by enrolling them in the virtual, ELD class, taught by one of our ELD teachers. You can contact your HST for more information.

Identifying students who need help learning English is important so they can get the support they need to become proficient in English and succeed in their academic curriculum.

Your child has been assigned to an appropriate English language instructional support program based on the results. The goal of this program is to help your child become proficient in English and succeed in the school's academic curriculum. Additional Instructional support is added by your child's teacher as needed. Please note that this does not change your student's homeschool teacher.

The Summative English Language Proficiency Assessments for California, or "Summative ELPAC," is the annual test used to measure how well students understand English and how each student is progressing in the areas of listening, speaking, reading, and writing. Information from the ELPAC tells your child's



teacher about the areas in which your child needs extra support.

### **This spring, your child will take the Summative ELPAC.**

Students in kindergarten through grade twelve who are classified as English learners will take the Summative ELPAC every year until they are reclassified as proficient in English. Students are tested on their skills in listening, speaking, reading, and writing.

You are an important part of your child's education. To help your child get ready for the test, you can:

- Read to your child, or have them read to you on a regular basis.
- Use pictures and ask your child to tell you what they see, or what is happening in each picture.
- Provide your child with opportunities to use language outside of school.
- Talk with your child's teacher about your child's listening, speaking, reading and writing skills to help support their progress.
- You also can look at sample test questions on the practice tests, which can be found on the ELPAC Starting Smarter website at <https://elpac.startingsmarter.org>

The goal of a language acquisition program is for EL students to become proficient in English and to meet state academic achievement measures. The Pacific Coast Academy reclassification (exit) criteria are listed below.

Required Criteria	Pacific Coast Academy Criteria
English Language Proficiency Assessment	ELPAC Overall Performance Level 4
Teacher Evaluation	Teacher provides input on the student's readiness for reclassification based on overall grades, scores, work samples, etc.
Parental Opinion and Consultation	Parent provides opinion on their child's readiness for reclassification.
Comparison of Performance in Basic Skills	<ul style="list-style-type: none"> <li>● Progress in English and Math class</li> <li>● Scores on Star 360</li> <li>● Scores on CAASPP</li> </ul>

### **Supports and Programs Offered by Pacific Coast Academy**

Your teacher can help you with these supports.

- Visit the EL Resources Page on our school's website to find more resources and information on the following:
  - Free online resources
  - EL Welcome Letter
  - MLAC meeting schedule and agendas.
- School provided EL curriculum
- Calendar of Meetings and Workshops for parents

To learn more about the ELPAC, go to the California Department of Education Parent Guides to

Understanding web page at <https://www.cde.ca.gov/ta/tg/ca/parentguidetounderstand.asp>.

Should you have questions regarding your child's instructional placement, programs or taking the ELPAC, please contact your child's teacher, or me, at the number or email listed below.

Sincerely,

Yolanda Osborne

Director of School Support

619-215-0704 x4165

~~(619) 993-0621~~ [yolanda.osborne@pacificcoastacademy.org](mailto:yolanda.osborne@pacificcoastacademy.org)

## EVIDENCE FORM - INITIAL ELPAC CORRECTION: CORRECTING ELAS FROM EL TO IFEP

Complete all information below and email, along with documentation to Yolanda Osborne at [yolanda.osborne@pacificcoastacademy.org](mailto:yolanda.osborne@pacificcoastacademy.org)

HST Name	Student Name
SSID	Grade
List of evidence attached	
1. Reading	
2. Writing	
3. Listening	
4. Speaking	
Additional teacher comments and observations	
Teacher Signature	Date
Parent Signature	Date
Final Outcome - Student ELAS will be corrected to IFEP: <input type="checkbox"/> Yes <input type="checkbox"/> No	
Director of ELD	Date

## PARENT NOTIFICATION LETTER OF RECLASSIFICATION

Dear Parent or Guardian of:

State and federal laws require all public charter schools in California to give a state test of English proficiency each year to every student who is identified as an English learner. In California, the name of this test is the English Language Proficiency Assessments for California (ELPAC). The results of the ELPAC help to measure how each student is progressing toward proficiency in English in the areas of listening, speaking, reading, and writing.

Your child has been administered the ELPAC for this year, and we have received those scores. We reviewed your child's performance on this test and also took into consideration:

- An evaluation of your child's academic performance, including, but not limited to, a review of curriculum mastery by one or more of his/her teachers
- Your child's performance in basic skills (e.g., state assessments known as Smarter Balanced Assessment and school benchmarks known as Star 360)
- Your opinion and feedback about your child's proficiency in English and readiness to be reclassified.

Based on all of this data, your child qualifies for reclassification out of the program. We will reclassify your child as reclassified fluent English proficient (RFEP). Please see attached reclassification form for scores and further details.

Please know that we will continue to monitor your child's academic progress specifically related to English proficiency. We thank you for your input and involvement in this process and congratulate your family on this achievement. If you have questions about the ELPAC or this letter, you can ask your HST, or they can also be directed to me as well.

Sincerely,

Yolanda Osborne

Director of School Support

619-215-0704 x4165

~~(619) 993-0621~~ [yolanda.osborne@pacificcoastacademy.org](mailto:yolanda.osborne@pacificcoastacademy.org)

## RECLASSIFICATION FORM FOR ENGLISH LEARNERS WITH DISABILITIES

### POLICY, FROM PCA EL MASTER PLAN:

#### Reclassifying English Learners with Disabilities

The reclassification criteria process is the same for Special Education students being considered for reclassification, except in those cases where the IEP team feels that the student's disability, more so than the language barrier, is the reason for why the student is not qualifying for reclassification. In such cases, it is the responsibility of the IEP team, case carrier, or teacher to initiate contact with the EL Designee or Coordinator to consider the alternative reclassification criteria and form. The IEP team, to include parents(s)/guardian(s) and the EL Designee/Coordinator, will discuss and complete the form. If the student is found to meet this criteria, he/she will then be reclassified to RFEP and four year monitoring will commence, as with all other RFEP students.

1. Indicate which ELPAC version the student completed <input type="checkbox"/> ELPAC <input type="checkbox"/> Alternative Version				
2. ELPAC Scores		3. English Language Proficiency/Academic Performance		
Overall Performance Level Score of 4?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Comparison of Basic Skills Data	English	Math
Domain Scores		Grades/Progress on		
Reading		AWRs		
Writing		SBAC Scores		
Listening		Star 360 Scores		
Speaking		Other		
4. Has the student met language proficiency criteria as assessed by ELPAC? <input type="checkbox"/> Yes <input type="checkbox"/> No				
5. If the student's overall proficiency level was below level 4, list other informal measures of proficiency the reclassification team used to determine that it is likely the student is proficient in English.				
6. Does the IEP/reclassification team believe the student's disability impedes the student's ability to demonstrate English proficiency in the ELPAC? <input type="checkbox"/> Yes <input type="checkbox"/> No				

<input type="checkbox"/> Student's performance is commensurate with his/her ability, due to his/her disability. <input type="checkbox"/> Student's performance is commensurate with that of peers who have a similar learning disability and are NOT English learners. <input type="checkbox"/> Student's errors are indicative of a student with his/her disability versus a language barrier. <input type="checkbox"/> Other/also:	
8. Was an English proficiency goal written into the student's IEP? <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>	
9. Did the student meet the English proficiency goal in their IEP? <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>	
10. Is it the belief of the IEP/reclassification team that the student has reached an appropriate level of English proficiency and should be reclassified? <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>	
11. Teacher Evaluation of Academic Progress (including, but not limited to curriculum mastery)	
12. Parent/Guardian Opinion and Consultation	
Final Outcome - Student will be reclassified: <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span>	
Teacher Signature	Director of ELD
Parent/Guardian Signature	Official RFEP Date
Case Carrier	IEP Team Member
IEP Team Member	IEP Team Member
Participants in RFEP process, if different than IEP team mentioned above	

## PCA K-12 TEACHER INPUT FOR RECLASSIFICATION

## RECLASSIFICATION – PCA 8/12/2022

Student #:

Student:

Teacher Name		Due Date	
Teacher Subject		Submitted Date	

This student has received an Overall Level 4 on the most recent ELPAC assessment and therefore qualifies for Reclassification to English Fluent Proficient. A score of "4" meets criteria ONE of FOUR for reclassification. The remaining criteria for reclassification.

## Student Information

First Name		Last Name		Local ID	
Student #		Grade Level		School	
Entered EL		Exited EL			

## Monitoring Questions

<b>1. Student's Current ELA grade (A, B, C, D, F or EE, ME, BE, AR)</b>
<b>2. Teacher Evaluation of Academic Progress</b> This includes comments, but not limited to, curriculum mastery.
<b>3. Parent/Guardian Opinion and Consultation</b> Please solicit parent feedback and opinion on reclassification and English proficiency
<b>4. Please indicate date that contact with parent/guardian was made.</b>

## Recommendation

As a classroom teacher for this student, I have been able to monitor academic progress during the indicated period and have submitted these answers and comments. Based on my observations, I recommend that (check option below):

Select one	
<input type="checkbox"/>	<b>Yes</b> - Student is recommended for reclassification
<input type="checkbox"/>	<b>No</b> - Student is not recommended for reclassification

**Signatures**

Subject \_\_\_\_\_

Date: \_\_\_\_\_



## K-12 RFEP STUDENT MONITORING

### RFEP STUDENT MONITORING – PCA 8/12/2022

**Student #:**

**Student:**

<b>Teacher Name</b>		<b>Due Date</b>	
<b>Teacher Subject</b>		<b>Submitted Date</b>	

This student is a former English Learner (ELs) who has exited the EL program. All former ELs are required to be "monitored" for four years after they exit the program. As this student's HST, your feedback is necessary. Please answer the questions below to provide feedback on how this student is performing academically.

#### Student Information

<b>First Name</b>		<b>Last Name</b>		<b>Local ID</b>	
<b>Student #</b>		<b>Grade Level</b>		<b>School</b>	
<b>Exited Monitoring Status</b>		<b>Date Monitored Since</b>			

#### Monitoring Questions

<b>1. Is student making expected growth in acquiring academic content knowledge?</b>	
<input type="checkbox"/>	Yes
<input type="checkbox"/>	No
<b>2. Are the student's Language Arts grades a C or better (6th-12th) or "Meeting Expectations" (TK-5th)?</b>	
<input type="checkbox"/>	Yes
<input type="checkbox"/>	No
<b>3. If you answered "no" to the question above, please explain. (poor attendance, missing assignments, etc.)</b>	
<b>4. Are supports beyond tier 1 necessary?</b>	
<input type="checkbox"/>	Yes

	No
<b>5. If you answered yes on previous question, please describe further. Specific academic need, description of specific support beyond tier 1, performance target (SMART goal)</b>	
<b>6. List any interventions the student is currently enrolled in</b>	

**Recommendation**

As a HST for this student, I have been able to monitor academic progress during the indicated period and have submitted these answers and comments. Based on my observations, this student:

<b>Select one</b>	
	<b>Displays Adequate Progress</b> - student shows adequate progress in the classroom
	<b>Needs Intervention</b> - student is recommended for intervention

**Signatures**

Subject \_\_\_\_\_

Date: \_\_\_\_\_

# Coversheet

## Promotion, Acceleration and Retention Policy

**Section:** V. Consent Agenda

**Item:** E. Promotion, Acceleration and Retention Policy

**Purpose:**

**Submitted by:**

**Related Material:**

PCA 2022-2023 Promotion Acceleration & Retention Policy\_Rev 9.16.2022\_Redlined 07.14.2023.pdf



Pacific Coast Academy

# Promotion, Acceleration & Retention Policy

~~2022-2023~~ 2023-24

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## Promotion, Acceleration and Retention Policy

Pacific Coast Academy is committed to making individual decisions on grade level acceleration based on the long-term, best interest of the individual student. Staff is committed to helping all students realize their fullest potential, when high academic achievement is evident, staff may request a student for acceleration into the next grade level. The student's maturity level shall be taken into consideration in making a determination to accelerate a student.

The purpose of the Pacific Coast Academy Governing Board approving this Promotion, Acceleration and Retention Policy is to accomplish the following:

1. Outline the Promotion Policy
2. Outline the Acceleration Policy
3. Outline the Retention Policy
4. Outline the Appeals Process for Parents
5. Establish the Process for IDEA/504 Students
6. Outline the Charter School Rights

### 1. Promotion Policy

#### K-8

Each K-8 student will be enrolled in four core subjects: Language Arts, Mathematics, Science, Social Studies, and include enrichment opportunities like art, music, athletics, world languages, technology, field trips, and virtual and in-person community and social experiences, providing a well- rounded education. Students shall progress through the grade levels by demonstrating growth in learning and meeting grade level standards.

#### High School

High school students can select courses from a variety of learning programs. Students will be enrolled in a minimum of 20 credits per semester (4 classes) unless considered a fifth-year senior. If the student is taking courses at a community college, he/she must meet with his/her counselor to obtain approval prior to enrolling in the community college courses.

Required Courses for All High School Grade Levels\*:

- English-Language Arts
- Mathematics
- Science
- Social Studies/History

\*This depends on the student's individual graduation plan and course progression.

## Four-Year Plan for High School Students

Supervising Teachers develop a four-year individual graduation plan (IGP) for each high school student. The IGP will be reviewed by the Guidance Counselor and/or Regional Administrator and revisited annually (unless necessary due to mid-year course changes). The four-year individual graduation plan will include:

- Learning Program
- Student's intended courses
- Courses completed
- Course of Study
- College and/or Career path

## 2. Acceleration Policy

When high academic achievement is evident, a teacher and/or parent may recommend a student for acceleration of courses. The student's social and emotional growth shall be taken into consideration in deciding to accelerate a student.

### Mid-Year Grade Level Acceleration Requests

The decision to promote a student mid-year will be made only after careful consideration has been given with regards to serving the academic best interests of the student. Mid-year promotions are approved or denied during the first semester. If a student is promoted during the first semester, he/she should be on target to complete all courses at his/her promoted grade level by the end of the school year. 8th to 9th grade acceleration requests are only considered in the fall semester before the high school add/drop date.

A child who was *not age-eligible* for kindergarten (that is, the child turned five after September 1 in the 2014-15 school year or thereafter) and who attended a California private school kindergarten for a year is viewed by the CDE as *not legally enrolled* in kindergarten, pursuant to EC Section 48000 requirements. Therefore, this child, upon enrollment in public school, is enrolled in kindergarten, assessed, and may (but is not required to) be immediately promoted to first grade if the child meets the following State Board of Education criteria, pursuant to Title 5, Section 200:

- The child is at least five years of age.
- The child has attended a public school kindergarten for a long enough time to enable school personnel to evaluate the child's ability.
- The child is in the upper 5 percent of the child's age group in terms of general mental ability.
- The physical development and social maturity of the child are consistent with the child's advanced mental ability.
- The parent or guardian has filed a written statement with the district that approves placement in first grade.

A statement, signed by the district and parent/guardian, is placed in the official school records for these five-year-olds who have been advanced to first grade (EC Section 48011). This action prevents a subsequent audit exception for first grade placement of an *age-ineligible* student.

## Procedure

In order for the school to make sound academic decisions regarding mid-year grade level promotions, the following process will be followed:

### Parent

Parent Request: Parents may request that the teacher promote their child one grade level during the first fall semester.

### Teacher

If the student's teacher agrees that a review for mid-year grade level promotion is appropriate, the teacher will complete a request for acceleration into the subsequent grade level and take the student's maturity level and academic abilities into consideration. The request should be sent to [gradelevelhelp@pacificcoastacademy.org](mailto:gradelevelhelp@pacificcoastacademy.org).

Accelerated promotion requests for students in grades KN-7 are due by ~~December 9, 2022~~ November 17, 2023.

Accelerated promotion requests for students in grade 8 are due by ~~August 31, 2022~~ August 25, 2023.

- If the student's assessment results are not above grade level, the teacher needs to provide documentation with a written request regarding why promotion is in the student's best interest.
- If the student is not on track to complete all courses at the grade level he/she would be promoted to, the teacher will need to explain in the written request why a promotion would be in the student's best interest.
- Information regarding prior grade retention and the circumstances of such will be considered as part of the accelerated promotion request process.

## Student Assessment Records

(A combination of the following will be used to assess the student's readiness to promote):

- **Teachers must meet and evaluate student in person.**
  - *Under no circumstance shall the parent or Learning Coach assist student with assessments when the assessment is being used to promote a student mid-year.*
- Bader Reading Assessment indicating the student is performing above current grade level.
- Writing Sample showing proficiency above grade-level standards.
- Benchmark Data (AWR reports) indicating the student has mastered current grade-level content/state standards.
- Benchmark results (STAR 360) in Mathematics and reading indicating the student is advanced at current grade-level content/state standards.



- SBAC results (for all applicable grade levels) indicating the student has met or exceeded standards.
- Student work samples, demonstrating proficiency above current grade-level standards.

### 3. Retention Policy

Pacific Coast Academy is committed to making individual decisions on grade retention based on the long-term, best interest of the individual student. Staff is committed to helping all students realize their fullest potential, including remediation for students that are experiencing difficulty. To that end, retention may be appropriate for a student experiencing extreme academic difficulty or serious health or family emergencies. Typically, retention is considered after various other remediation steps have been employed by student's teacher(s) and academic team with insufficient success. Special consideration will be given to students with limited English proficiency and those with a special education IEP. Students may be retained only once in their K-8 school career. After careful analysis of evidenced based instruction and intervention, retention is considered for the next school year.

#### Kindergarten Continuance Criteria

Students can also continue in grade K based upon current law. Kindergarten students who have completed one year of kindergarten shall be admitted to first grade unless the parent/guardian and the district agree that the student shall continue in kindergarten for not more than one additional school year based on student progress toward grade-level standards. (Ed Code 48011). Whenever a student continues in kindergarten for an additional year, the School Staff shall secure an agreement, signed by the parent/guardian stating that the student shall continue in kindergarten for not more than one additional school year. (Ed Code 46300.)

#### Grades 9-12 Retention Criteria

The state does not require school districts to have student retention criteria beyond the last year of middle school to the first year of high school. Progress toward high school graduation shall be based on the student's ability to pass the subjects and electives necessary to earn the required number of credits.

#### Grades 1-8 Retention Criteria

If a student is identified as performing far below the minimum standard for promotion based on their progress towards the grade-level content standards, the student may be considered for retention in his/her current grade level. Following the parent's written request, the Retention Committee will determine, based on a careful review of achievement data, if retention is the appropriate intervention for the student's academic deficiencies. The Retention Committee's determination shall specify the reasons that retention is appropriate for the student and shall include recommendations for interventions necessary to assist the student in attaining acceptable levels of academic achievement. If the teacher and parent are not in agreement with the recommendation of retention, please see below for the appeal process. The burden of proof for the appeal rests with the appealing party. (Ed Code 48070.5)

## Grades 1-8 Retention Timeline

Parents will request student retention in writing following the timeline explained below.

Step		Timeline
1	Teacher or parent recommends retention consideration for student.	Teacher – Complete the Retention Request Survey by <del>January 13, 2023</del> January 19, 2024.  Parent –Request grade-level retention in writing no later than the last day of the fall 2022 semester ( <del>January 6, 2023</del> January 12, 2024).
2	Remediation steps occur, including, but not limited to:  SST meetings & SST cycle Academic screenings Multi-tiered Systems of Supports, includes Tier, 1, Tier 2, and Tier 3 intervention Curriculum intervention	Teacher – September 2022 2023 through April 2023 2024.
3	The teacher and a Pacific Coast Academy administrator will invite the parent and student for a retention consultation meeting, during which the teacher, administrator, and parent/student will discuss the following available learning recovery options:  Available academic intervention and support programs and the benefits of such programs. Research on the effects of grade-level retention. The student's academic achievement data and any other information relevant to whether retention is in the student's best interest, academically and socially.	Administrator – Within 30 calendar days of the parent's written request.
4	Retention Committee meets to make recommendations regarding the student's grade-level placement for the next school year.  Factors:  Teacher Recommendation Parent analysis Grades Achievement Data – Benchmark, SBAC, assessments, AWRs SST and intervention usage data Cumulative Record	Retention Committee – May 2023 2024
5	School Administrator makes decision and informs parent or guardian.	School Administrator – By the last day of school ( <del>May 31, 2023</del> May 31, 2024).

## 4. Appeals and Parent Rights

Parents have the right to appeal a decision made by the Retention Committee. If a parent wishes to appeal, they would complete the following steps:

- The burden of proof to provide evidence related to the appeal rests on the appealing party.
- Appeals are not available for parents of students who are not planning to reenroll with Pacific Coast Academy the following school year.
- Appeal to the Retention Committee in writing within two (2) weeks of receiving the school's decision.
- The Retention Committee will review the retention-related data and respond within two (2) weeks.
- If not resolved, parents may appeal to Pacific Coast Academy's Executive Director in writing within two (2) weeks of the Retention Committee's dated response.
- The Executive Director will review the student's academic achievement data and send the parent or guardian a response in writing within two (2) weeks.
- The Executive Director will make all final decisions on retention appeals by the last day of school each academic year.
- The Executive Director's decision is final.

## 5. IDEA/504 Students

Students who participate in special education/504 plans have their education program and decision making process affected by state and federal regulations; therefore, decision-making in the area of grade promotion/retention is first governed by state and federal requirements.

## 6. The Charter School Rights

The policy adopted pursuant to this section shall be adopted at a public meeting of the Governing Board of Pacific Coast Academy. Nothing in this section shall be construed to prohibit the retention, promotion or acceleration of a pupil not included in grade levels identified in this policy, or for reasons other than those specified for pupils at risk for retention, if such retention is determined to be appropriate for that pupil. Nothing in this section shall be construed to prohibit the Governing Board from adopting promotion, acceleration and retention policies that exceed the criteria established in the California Ed. Code 48070.5, Promotion or Retention of Pupils.

## Grade Level Placement Chart ~~2022-2023~~ 2023-24

### Minimum age requirement for Kindergarten

As a result of legislation passed in September of 2010, children will be admitted into a Kindergarten program at the beginning of the school year, or whenever upon moving into the district, if they will have their 5th birthday on or before September 1st.

~~\*Students who will have their 5th birthday between September 2nd and June 30th can be admitted to Transitional Kindergarten at the beginning of the school year. Students who will have their 5th birthday between September 2nd and April 2nd can be admitted to Transitional Kindergarten.~~

Grade Level Placement Chart — <del>2022-2023</del>	
Birth Date Criteria	Grade Level
<del>09/02/17 – 02/02/18</del>	<del>TK – Transitional Kindergarten</del>
<del>09/02/16 – 09/01/17</del>	<del>KN – Kindergarten</del>
<del>09/02/15 – 09/01/16</del>	<del>1st</del>
<del>09/02/14 – 09/01/15</del>	<del>2nd</del>
<del>09/02/13 – 09/01/14</del>	<del>3rd</del>
<del>09/02/12 – 09/01/13</del>	<del>4th</del>
<del>09/02/11 – 09/01/12</del>	<del>5th</del>
<del>09/02/10 – 09/01/11</del>	<del>6th</del>
<del>09/02/09 – 09/01/10</del>	<del>7th</del>
<del>09/02/08 – 09/01/09</del>	<del>8th</del>
<del>09/02/07 – 09/01/08</del>	<del>9th</del>
<del>12/03/06 – 09/01/07</del>	<del>10th</del>
<del>12/03/05 – 12/03/06</del>	<del>11th</del>
<del>12/03/04 – 12/02/05</del>	<del>12th</del>

Grade Level Placement Chart – 2023-24	
Birth Date Criteria	Grade Level
Born after 04/02/2019	Not eligible for enrollment
09/02/18 - 04/02/19	TK - Transitional Kindergarten
09/02/17 - 09/01/18	KN - Kindergarten
09/02/16 - 09/01/17	1st

09/02/15 - 09/01/16	2nd
09/02/14 - 09/01/15	3rd
09/02/13 - 09/01/14	4th
09/02/12 - 09/01/13	5th
09/02/11 - 09/01/12	6th
09/02/10 - 09/01/11	7th
09/02/09 - 09/01/10	8th
09/02/08 - 09/01/09	9th
09/02/07 - 09/01/08	10th
12/03/06 - 12/02/07	11th
12/03/05 - 12/02/06	12th

# Coversheet

## Invoices over \$100,000

**Section:** V. Consent Agenda  
**Item:** F. Invoices over \$100,000  
**Purpose:**  
**Submitted by:**  
**Related Material:** REDACTED - PCA - CharterSAFE 6.7.23 - Invoice 42224 - \$164,983.pdf

0000-1110-0000-5400



P (888) 901-0004 / F (530) 637-5701

PO Box 969

Weimar, CA 95736

A California Public Agency

# INVOICE

Krystin Demofonte  
Pacific Coast Academy  
13915 Danielson St., Suite 103  
Poway, CA 92064

Invoice No: 42224  
Due Date: 07/01/2023  
Customer ID: 17842  
Terms: Upon Receipt

Description	Amount
25% Deposit 2023-2024 - Package Premium	\$123,638.00
25% Deposit 2023-2024 - Workers' Compensation	\$41,345.00

G.V.

## APPROVED

By Gloria Vazquez at 3:24 pm, Jun 26, 2023

Invoice Total: 164,983.00

Pymt Rec'd: 0.00

Balance Due: 164,983.00

Please note that insurance premiums are due the 1st day of the premium month.  
Payment for this invoice must be received by CharterSAFE on or before 07/01/2023.