



# California Pacific Charter Schools

## California Pacific Charter Schools

### Regular Meeting of the Board of Directors

Published on August 5, 2023 at 10:12 AM PDT

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#### **Date and Time**

Tuesday August 8, 2023 at 5:00 PM PDT

#### **Location**

Ayres Suites Diamond Bar  
Room: Provence  
21951 Golden Springs Dr  
Diamond Bar, CA 91765

#### **Join by telephone or via the Zoom conferencing link below:**

Dial by your location

+1 669 900 6833 US (San Jose)

+1 213 338 8477 US (Los Angeles)

Meeting ID: 975-1070-8162

<https://cal-pacs-org.zoom.us/j/97510708162>

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#### **MISSION STATEMENT**

CalPac's mission is to support and encourage all students to relentlessly pursue their life goals by providing an accessible and inclusive personalized learning community.

#### **THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE**

Notice is hereby given that the order of consideration of matters on this agenda may be changed without prior notice.

#### **REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY**

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The Governing Board's presiding officer reserves the right to impose reasonable time limits on public testimony to ensure that the agenda is completed.

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

Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting California Pacific Charter Schools at 949-752-0527.

**Agenda**

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>5:00 PM</b>
<b>A.</b> Call the Meeting to Order		Board President	1 m
<b>B.</b> Record Attendance		Board President	1 m
Roll Call:			
Kelly Wylie, President			
Dr. Shirley Peterson, Vice President			
Tanya Rogers, Clerk			
Bill Howard, Member			
Jason McFaul, Member			
<b>II. Pledge of Allegiance</b>			<b>5:02 PM</b>
<b>A.</b> Led by Board President or designee.		Board President	5 m
<b>III. Approve Adopt/Agenda</b>			<b>5:07 PM</b>
<b>A.</b> Agenda	Vote	Board President	1 m
It is recommended the Board of Directors adopt as presented, the agenda for the regular Board meeting of August 8, 2023.			
Roll Call Vote:			
Kelly Wylie			
Dr. Shirley Peterson			
Tanya Rogers			
Bill Howard			
Jason McFaul			
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

	Purpose	Presenter	Time
<b>IV. Approve Minutes</b>			<b>5:08 PM</b>
<b>A.</b> Minutes of the Regular Board meeting that was held on June 20, 2023	Approve Minutes	Board President	5 m
Roll Call Vote:			
Kelly Wylie			
Dr. Shirley Peterson			
Tanya Rogers			
Bill Howard			
Jason McFaul			
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

**V. Public Comment - Closed Session**

The public has a right to comment on any items of the closed session agenda. Members of the public will be permitted to comment on any other item within the Board’s jurisdiction under Public Comments/Recognition/Reports.

**VI. Adjourn to Closed Session** **5:13 PM**

The Board will consider and may act on any of the Closed Session matters.

Roll Call Vote:

Kelly Wylie

Dr. Shirley Peterson

Tanya Rogers

Bill Howard

Jason McFaul

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Ayes \_\_\_\_\_ Nays \_\_\_\_\_ Absent \_\_\_\_\_

<b>A.</b> Closed Session	Discuss	Board President	15 m
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**1. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION**

(Gov. Code Section 54956.9(d)(1))

a. TR v. The Collaborative Charter Services Organization, et al.

b. YL v. The Collaborative Charter Services Organization, et al.

	Purpose	Presenter	Time
<b>VII. Reconvene Regular Meeting</b>			<b>5:28 PM</b>
<b>A.</b> Report out any action that was taken in closed session.	Discuss	Board President	5 m
<b>VIII. Public Comments/Recognition/Reports</b>			
<p>Please submit a Request to Speak to the Board of Directors using the chat feature on the right hand side of the Zoom platform. Please state the agenda item number that you wish to address prior to the agenda item being called by the Board President. Not more than three (3) minutes are to be allotted to any one (1) speaker, and no more than twenty (20) minutes on the same subject. This portion of the agenda is for comments, recognitions and reports to the Board and is not intended to be a question and answer period. If you have questions for the Board, please provide the Board President with a written statement and an administrator will provide answers at a later date.</p>			
<b>IX. Correspondence/Proposals/Reports</b>			<b>5:33 PM</b>
<b>A.</b> School Highlights, Presented by Christine Feher, CEO/Superintendent	Discuss	Christine Feher	5 m
<b>B.</b> 2023-24 Preliminary Budget Review Letter - Acton-Agua Dulce USD	Discuss	Christine Feher	2 m
<p>In accordance with the provisions of Education Code (EC) Section 47604.32, a review of the California Pacific Charter 2023-24 Preliminary Budget has been completed by the Acton-Agua Dulce Unified School District.</p>			
<b>C.</b> CalPac Charter Extension 2023-24 Letters	Discuss	Christine Feher	2 m
<p>Per SB 114, signed by the Governor on July 10, 2023, EC Section 47607.4 was amended to extend the terms of charter schools. California Pacific Charter - Sonoma now expires on 6/30/2027. California Pacific Charter - Los Angeles and California Pacific Charter - San Diego now expire on 6/30/2028.</p>			
<b>X. Consent</b>			<b>5:42 PM</b>
<p>Items listed under Consent are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent Calendar upon the request of any member of the Board, discussed, and acted upon separately.</p>			



	Purpose	Presenter	Time
<b>A.</b>	Consent - Business/Financial Services		1 m
	<ul style="list-style-type: none"> <li>1. Check Registers - June 2023 &amp; July 2023</li> <li>2. J.P. Morgan Statement - June 2023 &amp; July 2023</li> <li>3. Hatch &amp; Cesario Agreement - Renewal</li> <li>4. Approval of Surplus of Electronic Devices</li> </ul>		
<b>B.</b>	Consent - Education/Student Services		1 m
	<ul style="list-style-type: none"> <li>1. Approval of 2023-24 English Learner Master Plan for California Pacific Charter Schools, Sonoma (#2037), San Diego (#1758), and Los Angeles (#1751)</li> <li>2. Approval of 2023-24 Title 1 School- Parent/Guardian Compact for California Pacific Charter Schools, Sonoma (#2037), San Diego (#1758), and Los Angeles (#1751)</li> </ul>		
<b>C.</b>	Consent - Personnel Services		1 m
	<ul style="list-style-type: none"> <li>1. Approval of Certificated - Personnel Report</li> <li>2. Approval of Classified - Personnel Report</li> <li>3. Approval of Job Descriptions revisions</li> <li>4. Approval of Employee Handbook 2023-2024 Revised (to align with recent law changes)</li> <li>5. Approval of Revised Arbitration Agreement to align with recent law changes</li> </ul>		
<b>D.</b>	Consent - Policy Development	Vote	Board President
	Approval of existing board policies revised by staff for the 2023-24 school year.		1 m

**Board Policies: Revised**

The following are current policies that have been revised to provide clarity or alignment with changes in law or procedures.

**4000 Series - Personnel Services**

4150-CPCS Mileage Reimbursement Policy

**6000 Series - Instruction**

6040-CPCS Local Assessment Policy

	Purpose	Presenter	Time
<p><b>Consent items listed A through D are considered routine and will be approved/adopted by a single motion.</b></p>			

Roll Call Vote:

Kelly Wylie

Dr. Shirley Peterson

Tanya Rogers

Bill Howard

Jason McFaul

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Ayes \_\_\_\_\_ Nays \_\_\_\_\_ Absent \_\_\_\_\_

**XI. Business/Financial Services**

**5:46 PM**

- |   |             |                        |            |
|---|-------------|------------------------|------------|
| <p><b>A.</b> Approval of Funds for Purchase of Student and Faculty Technology</p> | <p>Vote</p> | <p>Christine Feher</p> | <p>5 m</p> |
|---|-------------|------------------------|------------|

It is recommended the Board approve the purchase of student and faculty technology for California Pacific Charter Schools - Sonoma (#2037), San Diego (#1758), and Los Angeles (#1751) for the 2023-24 school year.

Fiscal Impact: Up to \$200,000.00

*(Allocation split may vary dependent on actual enrollment)*

California Pacific Charter - Los Angeles (#1751) \$100,000.00

California Pacific Charter - San Diego (#1758) \$64,000.00

California Pacific Charter - Sonoma (#2037) \$36,000.00

Roll Call Vote:

Kelly Wylie

Dr. Shirley Peterson

Tanya Rogers

Bill Howard

Jason McFaul

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Ayes \_\_\_\_\_ Nays \_\_\_\_\_ Absent \_\_\_\_\_

- |   |             |                        |            |
|---|-------------|------------------------|------------|
| <p><b>B.</b> Approval of PresenceLearning, Inc Contract (Renewal)</p> | <p>Vote</p> | <p>Christine Feher</p> | <p>5 m</p> |
|---|-------------|------------------------|------------|

It is recommended the Board approve PresenceLearning, Inc for California Pacific Charter Schools - Sonoma (#2037), San Diego (#1758), and Los Angeles (#1751).

Fiscal Impact: Up to \$40,000.00

	Purpose	Presenter	Time
<i>(Allocation split may vary dependent on actual enrollment)</i>			
California Pacific Charter - Los Angeles (#1751)	\$ 20,000.00		
California Pacific Charter - San Diego (#1758)	\$ 12,800.00		
California Pacific Charter - Sonoma (#2037)	\$ 7,200.00		

Roll Call Vote:

Kelly Wylie

Dr. Shirley Peterson

Tanya Rogers

Bill Howard

Jason McFaul

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Ayes \_\_\_\_\_ Nays \_\_\_\_\_ Absent \_\_\_\_\_

**XII. Calendar**

The next scheduled regular meeting of the Board of Directors will be held on September 12, 2023.

**XIII. Comments**

**5:56 PM**

**A.** Board Comments

5 m

**B.** CEO/Superintendent Comments

5 m

**XIV. Closing Items**

**6:06 PM**

**A.** Adjourn Meeting

Vote

1 m

Roll Call Vote:

Kelly Wylie

Dr. Shirley Peterson

Tanya Rogers

Bill Howard

Jason McFaul

Moved by \_\_\_\_\_ Seconded by \_\_\_\_\_ Ayes \_\_\_\_\_ Nays \_\_\_\_\_ Absent \_\_\_\_\_

**FOR MORE INFORMATION**

For more information concerning this agenda, contact  
California Pacific Charter Schools. Telephone: 949-688-7798



## Coversheet

### Minutes of the Regular Board meeting that was held on June 20, 2023

**Section:** IV. Approve Minutes  
**Item:** A. Minutes of the Regular Board meeting that was held on June 20, 2023  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for Regular Meeting of the Board of Directors on June 20, 2023

APPROVED



# California Pacific Charter Schools

California Pacific Charter Schools

## Minutes

Regular Meeting of the Board of Directors

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### Date and Time

Tuesday June 20, 2023 at 5:00 PM

### Location

Holiday Inn Diamond Bar  
Room: Northgate 101  
21725 E Gateway Center Dr.  
Diamond Bar, CA 91765

### Teleconference Locations

1850 Peary Way, Livermore, CA 94550  
4820 Renovo Way, San Diego, CA 92124  
Hyatt Centric Congress Ave Austin, Room: Recording Lounge, 721 Congress Ave, Austin, TX  
78702

### Join by telephone or via Zoom conferencing link below:

Dial by your location

+1 669 900 6833 US (San Jose)

+1 213 338 8477 US (Los Angeles)

Meeting ID: 92155661630

<https://cal-pacs-org.zoom.us/j/92155661630>

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### MISSION STATEMENT

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**Directors Present**

J. McFaul, K. Wylie (remote), S. Peterson (remote), T. Rogers (remote), W. Howard

**Directors Absent**

*None*

**Guests Present**

C. Amador (remote), C. Feher, D. Carlos, L. Hath (remote), S. Green (remote)

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**I. Opening Items**

**A. Call the Meeting to Order**

K. Wylie called a meeting of the board of directors of California Pacific Charter Schools to order on Tuesday Jun 20, 2023 at 5:02 PM.

**B. Record Attendance**

**II. Pledge of Allegiance**

**A. Led by Board President or designee**

K. Wylie, President, led the Pledge of Allegiance

**III. Approve Adopt/Agenda**

**A. Agenda**

T. Rogers made a motion to approve the agenda as presented.

J. McFaul seconded the motion.

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

#### **IV. Approve Minutes**

##### **A. Minutes of the Regular Board meeting that was held on June 13, 2023**

J. McFaul made a motion to to approve the minutes for Regular Meeting of the Board of Directors on 06-13-23.

W. Howard seconded the motion.

2 Board Members abstained due to being absent during June 13, 2023, meeting

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

##### **Roll Call**

W. Howard Aye

S. Peterson Abstain

K. Wylie Aye

J. McFaul Aye

T. Rogers Abstain

#### **V. Public Comment - Closed Session**

##### **A. There were no public comments regarding Closed Session**

###### **1. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION**

(Gov. Code Section 54956.9(d)(1))

a. TR v. The Collaborative Charter Services Organization, et al.

b. YL v. The Collaborative Charter Services Organization, et al.

###### **2. PUBLIC EMPLOYEE PERFORMANCE EVALUATION**

Pursuant to Government Code 54957

a. Superintendent, Performance Evaluation and Goals

#### **VI. Adjourn to Closed Session**

##### **A. Closed Session**

The Board of Directors adjourned to closed session at 5:06 p.m.

S. Peterson made a motion to adjourn to Closed Session at 5:06 pm.

W. Howard seconded the motion.

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

#### **VII. Reconvene Regular Meeting**

##### **A. Report out any action that was taken in closed session.**

The meeting reconvened at 5:36 pm.



T. Rogers, Clerk, reported, "Board unanimously accepted the evaluation of the superintendent for this past year with the highest possible rating of satisfactory."

### **VIII. Public Comments/Recognition/Reports**

#### **A. Public Comments**

There were no requests for public comment submitted.

### **IX. Correspondence/Proposals/Reports**

#### **A. School Highlights, Presented by Christine Feher, CEO/Superintendent**

C. Feher presented June 2023 School Highlights for CalPac LA, SD, and SO.

### **X. Consent**

#### **A. Consent - Business/Financial Services**

1. Approval of Surplus of Electronic Devices

#### **B. Consent - Policy Development**

T. Rogers made a motion to approve the consent items listed A through B by a single motion.

S. Peterson seconded the motion.

1. Approval of Third Amended Corporation Bylaws
2. Approval of existing board policies revised, reviewed, and eliminated by staff for the 2022-2023 school year.

#### **Board Policies: Revised**

The following are current policies that have been revised to provide clarity or alignment with changes in law or procedures.

#### **9000 Series - Board Policies and Procedures**

- 9000 - CPCS Role of the Board
- 9005 - CPCS Governance Standards
- 9010 - CPCS Public Statements
- 9011 - CPCS Disclosure of Confidential/Privileged Information
- 9012 - CPCS Board Member Electronic Communications
- 9100 - CPCS Organization
- 9110 - CPCS Terms of Office
- 9121 - CPCS President
- 9122 - CPCS Secretary
- 9123 - CPCS Clerk

- 9200 - CPCS Limits of Board Member Authority
- 9222 - CPCS Resignation
- 9223 - CPCS Filling Vacancies
- 9224 - CPCS Oath or Affirmation
- 9224E - CPCS Oath or Affirmation
- 9230 - CPCS Orientation
- 9240 - CPCS Board Training
- 9250 - CPCS Remuneration, Reimbursement, and Other Benefits
- 9260 - CPCS Legal Protection
- 9270 - CPCS Conflict of Interest
- 9310 - CPCS Board Policies
- 9320 - CPCS Meetings and Notices
- 9321 - CPCS Closed Session Purposes and Agenda
- 9321.1 - CPCS Closed Session Actions and Reports
- 9322 - CPCS Agenda/Meeting Materials
- 9323 - CPCS Meeting Conduct
- 9323.1 - CPCS Actions by the Board
- 9324 - CPCS Minutes and Recordings
- 9400 - CPCS Board Self Evaluation

**Board Policy: Rescinded**

The following is a current policy that is no longer applicable and should therefore be archived.

**9000 Series - Board Policies and Procedures**

- 9270E - CPCS Conflict of Interest Policy

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

**XI. Business/Financial Services**

**A. Budget Adoption 2023-2024**

S. Peterson made a motion to approve the Budget Adoption 2023-2024.

T. Rogers seconded the motion.

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

**B. Approval of RingCentral Contract (Renewal)**

J. McFaul made a motion to approve the RingCentral Contract Renewal.

W. Howard seconded the motion.

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

**XII. Education/Student Services**

**A.**

### **Approval of Local Control & Accountability Plan (LCAP) 2023-2024**

J. McFaul made a motion to approve the Local Control & Accountability Plan (LCAP) 2023-2024.

W. Howard seconded the motion.

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

### **B. Approval of 2023 LCAP Local Performance Indicator Self-Reflection**

T. Rogers made a motion to approve the 2023 LCAP Local Performance Indicators.

S. Peterson seconded the motion.

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

## **XIII. Comments**

### **A. Board Comments**

During the meeting, S. Peterson expressed gratitude to her fellow board members for their support for CalPac this year. She also extended her thanks to C. Feher for her hard work and acknowledged the efforts of the staff. S. Peterson appreciated the opportunity to serve and eagerly anticipated the upcoming year. T. Rogers considered herself very fortunate to have C. Feher and expressed her gratitude towards both her fellow board members and C. Feher. W. Howard thanked all the fellow board members, specifically mentioning C. Feher, and expressed his anticipation for the following year, particularly looking forward to in-person interactions. J. McFaul thanked the board, superintendent, and CalPac staff, congratulating the graduates. He also expressed excitement about the focus on the A-G requirements and highlighted the importance of patience in helping students achieve their goals. K. Wylie echoed the sentiments of the other board members and took the opportunity to acknowledge the partners who consistently participated in every meeting.

### **B. CEO/Superintendent Comments**

C. Feher can't believe that the school year is over. There is a lot to celebrate, and she understands that there is a lot of work to be done in the coming years. She felt very encouraged by all that has happened and is going on. Though is aware that in education, the work is never done. She acknowledged that CalPac has an incredible board and is thankful for them. She also acknowledged the great relationship between CalPac and our authorizers. She felt that it had been a good year and was ready and excited to serve another year.

## **XIV. Closing Items**

### **A. Adjourn Meeting**

W. Howard made a motion to adjourn the Regular Meeting of the Board of Directors for June 20, 2023.

S. Peterson seconded the motion.

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

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:18 PM.

Respectfully Submitted,

K. Wylie

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### Documents used during the meeting

- CPCS BB 9011 Disclosure of Confidential...on\_redline\_6.20.23.pdf
- CPCS BB 9012 Board Member Electronic Communications.pdf
- CPCS BB 9012 Board Member Electronic Co...ns\_redline\_6.20.23.pdf
- CPCS BB 9100 Organization.pdf
- CPCS BB 9100 Organization\_redline\_6.20.23.pdf
- CPCS BB 9110 Terms of Office.pdf
- CPCS BB 9110 Terms of Office\_redline\_6.20.23.pdf
- CPCS BB 9121 Chair.pdf
- CPCS BB 9121 Chair\_redline\_6.20.23.pdf
- CPCS BB 9122 Secretary.pdf
- CPCS BB 9122 Secretary\_redline\_6.20.23.pdf
- CPCS BB 9123 Clerk.pdf
- CPCS BB 9123 Clerk\_redline\_6.20.23.pdf
- CPCS BB 9200 Limits Of Board Member Authority.pdf
- CPCS BB 9200 Limits Of Board Member Aut...ty\_redline\_6.20.23.pdf
- CPCS BB 9222 Resignation.pdf
- CPCS BB 9222 Resignation\_redline\_6.20.23.pdf
- CPCS BB 9223 Filling Vacancies.pdf
- CPCS BB 9223 Filling Va...es\_redline\_06.20.23.pdf
- CPCS BB 9224 Oath or Affirmation.pdf
- CPCS BB 9224 Oath or Affirmation\_redline\_6.20.23.pdf
- CPCS BB 9224E Oath or Affirmation.pdf
- CPCS BB 9224E Oath or Affirmation\_redline\_6.20.23.pdf
- CPCS BB 9230 Orientation.pdf
- CPCS BB 9230 Orientation\_redline\_6.20.23.pdf
- CPCS BB 9240 Board Training.pdf

- CPCS BB 9240 Board Training\_redline\_6.20.23.pdf
- CPCS BB 9250 Remuneration, Reimbursement and Other Benefits.pdf
- CPCS BB 9250 Remuneration, Reimbursemen...ts\_redline\_6.20.23.pdf
- CPCS BB 9260 Legal Protection.pdf
- CPCS BB 9260 Legal Protection\_redline\_6.20.23.pdf
- CPCS BB 9270 Conflict of Interest.pdf
- CPCS BB 9270 Conflict of Interest\_redline\_6.20.23.pdf
- CPCS BB 9310 Board Policies.pdf
- CPCS BB 9310 Board Policies\_redline\_6.20.23.pdf
- CPCS BB 9320 Meetings and Notices.pdf
- CPCS BB 9320 Meetings and Notices\_redline\_6.20.23.pdf
- CPCS BB 9321 Closed Session Purposes and Agendas.pdf
- CPCS BB 9321 Closed Session Purposes an...as\_redline\_6.20.23.pdf
- CPCS BB 9321.1 Closed Session Actions And Reports.pdf
- CPCS BB 9321.1 Closed Session Actions A...ts\_redline\_6.20.23.pdf
- CPCS BB 9322 Agenda Meeting Materials.pdf
- CPCS BB 9322 Agenda\_Meeting Materials\_redline\_6.20.23.pdf
- CPCS BB 9323 Meeting Conduct.pdf
- CPCS BB 9323 Meeting Conduct\_redline\_6.20.23.pdf
- CPCS BB 9323.1 Actions by the Board.pdf
- CPCS BB 9323.1 Actions by the Board\_redline\_6.20.23.pdf
- CPCS BB 9324 Minutes and Recordings.pdf
- CPCS BB 9324 Minutes and Recordings\_redline\_6.20.23.pdf
- CPCS BB 9400 Board Self-Evaluation.pdf
- CPCS BB 9400 Board Self-Evaluation\_redline\_6.20.23.pdf
- CPCS BB 9270E Conflict of Interest.pdf
- 2023-24 Preliminary Budget - California Pacific Charter Schools.pdf
- 2023-24 Preliminary Budget Presentation 06.20.2023.pdf
- 2023-24 Budget Overview for Parents-#1751 California Pacific Charter-LA.pdf
- 2023-24 Budget Overview for Parents-#1758 California Pacific Charter-SD.pdf
- 2023-24 Budget Overview for Parents-#2037 California Pacific Charter-Sonoma.pdf
- EPA Expenditure Summary #1751 California Pacific Charter School-LA.pdf
- EPA Expenditure Summary #1758 California Pacific Charter School-SD.pdf
- EPA Expenditure Summary #2037 California Pacific Charter School-Sonoma.pdf
- Ring Central - 12 Mo Contract.pdf

- 2022-23\_LCAP\_Year\_2\_Outcomes\_Presentation.pdf
  - 2023\_LCAP\_CPC-LA.pdf
  - 2023\_LCAP\_CPC-SD.pdf
  - 2023\_LCAP\_CPC-SO.pdf
  - 22-23\_Local\_Performance\_Indicators\_Presentation (1).pdf
  - 2023\_LCAP\_Local\_Performance\_Indicator\_Self-Reflection\_CPC-LA (1).pdf
  - 2023\_LCAP\_Local\_Performance\_Indicator\_Self-Reflection\_CPC-SD (1).pdf
  - 2023\_LCAP\_Local\_Performance\_Indicator\_Self-Reflection\_CPC-SO (1).pdf
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#### FOR MORE INFORMATION

For more information concerning this agenda, contact  
California Pacific Charter Schools. Telephone: 949-688-7798

# Coversheet

## School Highlights, Presented by Christine Feher, CEO/Superintendent

**Section:** IX. Correspondence/Proposals/Reports  
**Item:** A. School Highlights, Presented by Christine Feher, CEO/Superintendent  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:** July 23-24 SD School Highlights.pdf  
July 23-24 LA School Highlights.pdf  
July 23-24 SO School Highlights.pdf

# CPCS San Diego School Highlights

JULY

**ROOTED**  
Growing Together

2023 - 2024

## Current Enrollment

242

## Program Highlights

CalPac was excited to kick-off summer school on July 5th. High school students have the opportunity to recover credits toward graduation and A-G completion and K-8 students are participating in learning acceleration. As part of the summer skill building in math and reading, K-8 students and teachers piloted a new local assessment, Renaissance STAR, as well as a supporting curriculum component, Freckle. This pilot program is providing an early glimpse into what implementation will look like when all students return in the fall.

Enrollment throughout the summer months has been very strong. Strategic marketing efforts coupled with the ongoing work of the amazing admissions team has successfully brought in new students. In addition, master agreement meetings have been scheduled and held for many







# San Diego

JULY 2023

returning students. Combined enrollment is trending positively and we look forward to starting the school year as close to full as possible.

Administrators are incorporating feedback and evidence from education partners to develop a comprehensive WASC self-study report in preparation for an upcoming visit in the fall.



## Student Achievement

Summer Renaissance STAR Snapshot: K-8th grade students completed STAR reading and math assessments to set baseline performance data. Teachers met with students to review scores and set goals for the six week summer program. Scores were imported into Renaissance's companion program, Freckle. Freckle creates a personalized learning path to target low performing skills in order to bring these students to grade level. Students have been working on their personalized learning paths daily. We anticipate seeing positive growth trends when students complete their STAR post tests at the end of the summer program.



## Professional Development

Staff participated in AVID summer learning this month. AVID professional development strands focused on student collaboration, goal setting, and WICOR writing strategies. Staff members are excited to implement what they have learned, particularly in the area of digital interactive notebooks.

K-8 summer school teachers participated in a Renaissance STAR and Freckle training in order to kick off the pilot of both STAR assessments and Freckle individualized learning. Their insight will help support whole staff training as part of the 23-24 school year kick off.

Administration kept a close eye on budget and legislative changes this month and attended CSDC and YMC presentations addressing potential changes for the upcoming school year.





# San Diego

JULY 2023

## Smart Goals

School administration is in the process of working collaboratively with education partners to develop smart goals for the 23-24 school year.

## Pictures & Videos

## Future Projects

- Department Chair Meeting August 3
- Family Park Day August 15
- New Teacher Training August 17-21
- All Teachers Return August 22
- 23-24 School Year Kick Off and Staff Development Aug 22-26
- First Day of School is August 30th



# CPCS Los Angeles School Highlights

JULY

**ROOTED**  
Growing Together

2023 - 2024

## Current Enrollment

**403**

## Program Highlights

CalPac was excited to kick-off summer school on July 5th. High school students have the opportunity to recover credits toward graduation and A-G completion and K-8 students are participating in learning acceleration. As part of the summer skill building in math and reading, K-8 students and teachers piloted a new local assessment, Renaissance STAR, as well as a supporting curriculum component, Freckle. This pilot program is providing an early glimpse into what implementation will look like when all students return in the fall.

Enrollment throughout the summer months has been very strong. Strategic marketing efforts coupled with the ongoing work of the amazing admissions team has successfully brought in new students. In addition, master agreement meetings have been scheduled and held for many





# Los Angeles

JULY 2023

returning students. Combined enrollment is trending positively and we look forward to starting the school year as close to full as possible.

Administrators are incorporating feedback and evidence from education partners to develop a comprehensive WASC self-study report in preparation for an upcoming visit in the fall.



## Student Achievement

Summer Renaissance STAR Snapshot: K-8th grade students completed STAR reading and math assessments to set baseline performance data. Teachers met with students to review scores and set goals for the six week summer program. Scores were imported into Renaissance's companion program, Freckle. Freckle creates a personalized learning path to target low performing skills in order to bring these students to grade level. Students have been working on their personalized learning paths daily. We anticipate seeing positive growth trends when students complete their STAR post tests at the end of the summer program.



## Professional Development

Staff participated in AVID summer learning this month. AVID professional development strands focused on student collaboration, goal setting, and WICOR writing strategies. Staff members are excited to implement what they have learned, particularly in the area of digital interactive notebooks.

K-8 summer school teachers participated in a Renaissance STAR and Freckle training in order to kick off the pilot of both STAR assessments and Freckle individualized learning. Their insight will help support whole staff training as part of the 23-24 school year kick off.

Administration kept a close eye on budget and legislative changes this month and attended CSDC and YMC presentations addressing potential changes for the upcoming school year.





# Los Angeles

JULY 2023

## Smart Goals

School administration is in the process of working collaboratively with education partners to develop smart goals for the 23-24 school year.

## Pictures & Videos

## Future Projects

Department Chair Meeting August 3  
Family Park Day August 15  
New Teacher Training August 17-21  
All Teachers Return August 22  
23-24 School Year Kick Off and Staff Development Aug 22-26  
First Day of School is August 30th



# CPCS Sonoma School Highlights

JULY

**ROOTED**  
Growing Together

2023 - 2024

## Current Enrollment

**137**

### Program Highlights

CalPac was excited to kick-off summer school on July 5th. High school students have the opportunity to recover credits toward graduation and A-G completion and K-8 students are participating in learning acceleration. As part of the summer skill building in math and reading, K-8 students and teachers piloted a new local assessment, Renaissance STAR, as well as a supporting curriculum component, Freckle. This pilot program is providing an early glimpse into what implementation will look like when all students return in the fall.

Enrollment throughout the summer months has been very strong. Strategic marketing efforts coupled with the ongoing work of the amazing admissions team has successfully brought in new students. In addition, master agreement meetings have been scheduled and held for many





# Sonoma

JULY 2023

returning students. Combined enrollment is trending positively and we look forward to starting the school year as close to full as possible.

Administrators are incorporating feedback and evidence from education partners to develop a comprehensive WASC self-study report in preparation for an upcoming visit in the fall.



## Student Achievement

Summer Renaissance STAR Snapshot: K-8th grade students completed STAR reading and math assessments to set baseline performance data. Teachers met with students to review scores and set goals for the six week summer program. Scores were imported into Renaissance's companion program, Freckle. Freckle creates a personalized learning path to target low performing skills in order to bring these students to grade level. Students have been working on their personalized learning paths daily. We anticipate seeing positive growth trends when students complete their STAR post tests at the end of the summer program.



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K-8 summer school teachers participated in a Renaissance STAR and Freckle training in order to kick off the pilot of both STAR assessments and Freckle individualized learning. Their insight will help support whole staff training as part of the 23-24 school year kick off.

Administration kept a close eye on budget and legislative changes this month and attended CSDC and YMC presentations addressing potential changes for the upcoming school year.





# Sonoma

JULY 2023

## Smart Goals

School administration is in the process of working collaboratively with education partners to develop smart goals for the 23-24 school year.

## Pictures & Videos

## Future Projects

Department Chair Meeting August 3  
Family Park Day August 15  
New Teacher Training August 17-21  
All Teachers Return August 22  
23-24 School Year Kick Off and Staff Development Aug 22-26  
First Day of School is August 30th





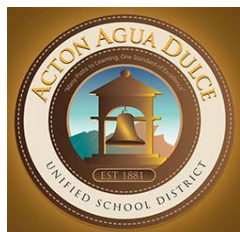
# Coversheet

## 2023-24 Preliminary Budget Review Letter - Acton-Agua Dulce USD

**Section:** IX. Correspondence/Proposals/Reports  
**Item:** B. 2023-24 Preliminary Budget Review Letter - Acton-Agua Dulce USD  
**Purpose:** Discuss  
**Submitted by:** Christine Feher  
**Related Material:** 2023-24 CA Pacific Charter Prelim Budget review letter.pdf

### BACKGROUND:

In accordance with the provisions of Education Code (EC) Section 47604.32, a review of the California Pacific Charter 2023-24 Preliminary Budget has been completed by the Acton-Agua Dulce Unified School District.



## ACTON-AGUA DULCE UNIFIED SCHOOL DISTRICT

32248 Crown Valley Rd.

Acton, CA 93510

661-269-0750

July 5, 2023

Board President, California Pacific Charter  
940 South Coast Dr. #185  
Costa Mesa, CA 92626

Dear Board President:

In accordance with the provisions of Education Code (EC) Section 47604.32, a review of the California Pacific Charter 2023-24 Preliminary Budget has been completed by the Acton-Agua Dulce Unified School District. Please see the enclosed Summary Analysis that provides the details of our review.

We wish to thank the Charter School's staff for their cooperation during the review. Should you have any questions or concerns, please contact the District Office.

Sincerely,

A handwritten signature in blue ink, appearing to read "Kevin Vensko".

Kevin Vensko  
Assistant Superintendent of Business Services  
Acton-Agua Dulce Unified School District

Cc: Ms. Christine Feher, Superintendent, California Pacific Charter  
Dr. Eric Sahakian, Superintendent, AADUSD  
Ms. Neshia Pattison, AADUSD

## Charter School Budget Summary Analysis

**Reporting Period:** 2023-24 Preliminary Budget

**Charter Name:** California Pacific Charter

**CDS:** 19-75309-0132654

<u>Reporting Period</u>	<u>ADA</u>
2023-24 Prelim Budget	<b>402.00</b>
2022-23 Estimated Actuals	<b>283.76</b>
2022-23 P-2	<b>369.98</b>
2021-22 P-2	<b>332.01</b>
2020-21 P-2	<b>282.24</b>
2019-20 P2	<b>282.24</b>
2018-19 P2	<b>898.09</b>
2017-18 P2	<b>2,143.34</b>
2016-17 P2	<b>1,900.00</b>
<b>Total Revenue:</b>	\$6,168,396
<b>Total Expenditures:</b>	\$6,042,631
Excess/(Deficiency):	\$125,765
<b>Beginning Fund Balance:</b>	\$2,719,055
<b>Ending Fund Balance:</b>	\$2,844,820

**Reserve Requirement:** For ADA between 301 to and 1,000, the reserve requirement is the greater of 4% or \$80,000. California Pacific Charter's 2023-24 estimated P-2 ADA is 402.

**Reserves:** The Charter School's reserve requirement is \$241,705. Its ending fund balance of \$2,844,820 demonstrates that the Charter is able to meet its required reserve for economic uncertainty. The Charter reserved \$2,844,820 in its 2023-24 Preliminary Budget projection.

**Analysis/Comments:** Local Control Funding Formula revenues are calculated based on ADA of 402, an 8.65% increase over prior year. Total LCFF is budgeted at \$5.2 million, a \$757K increase over 2022-23 Estimated Actuals. Federal revenue totals \$255K, a \$376K decrease as compared to 2022-23 Estimated Actuals. Other State Revenues total \$706K, a \$166K increase over 2022-23 Estimated Actuals. No Other Local Revenue is budgeted. **Total revenue is \$6,168,396, an increase of \$543,345 as compared to 2022-23 Estimated Actuals.**

Personnel expenditures represent 81% of total expenditures, a 2% increase over 2022-23 Estimated Actuals. The Charter School participates in STRS. Certificated Salaries increased by \$209K to \$2.9 million, Classified Salaries by \$222K to \$910K and Benefits increased by \$206K to \$1.1 million. Books and Supplies decreased by \$29K to \$354K and Services and Other Operating increased by \$65K to \$802K. **Total expense is \$6,042,631, a \$671,951 increase as compared to 2022-23 Estimated Actuals.**

The Charter reports no debt on Form Debt.

The Charter's cash flow reports positive cash throughout 2023-24. The Charter's July 2023 beginning cash is estimated at \$2,390,590. Receivables and Payables are entirely distributed in July 2023. The Charter's lowest cash month is October 2023 at \$2,671,894 with no loans

The Charter's MYP assumes 8.65% increase in 2023-24, a 1.84% increase in 2024-25 and a .66% increase in 2025-26. The Charter's 3-year average ADA is 9.71%. Expense increases are noted in the out years of the MYP.

#### **Assessment:**

The Charter School estimates a **positive** ending fund balance for **FY 2023-24**.

- The Charter projects an 8.65% increase in ADA in the budget year.
- The Charter does not project to deficit spend in the budget or out years of its 2023-34 Preliminary Budget.
- The Charter recorded in excess of its required reserve at 2023-24 Preliminary Budget.
- The Charter projects its ending fund balance will grow to 46.1% in 23-24, 46.6% in 24-25, and 46.2% in 25-26.
- The Charter is debt-free.
- The Charter's cash flow projects a positive cash position for 2023-24.

**First Interim Requirements:** Provide the District with the following on or before **December 1, 2023:**

- 2023-24 First Interim Alternative Form **or** a PDF file of the Charter's officially exported SACS Form 62 and/or MYP. The District will provide the required Alternative Form and MYP file. This file must be completed and returned in Excel format. Charters may not use their own version of this form.
- Original signed Form Certification.
- A Multi-Year Projection (MYP) with the base year 2023-24 and two out years, 2024-25, and 2025-26, using the District-provided Excel file. Charters utilizing SACS software may use either the MYP template included with the software or use the District-provided Excel MYP template. Charters may not use their own version of this form.
- Written narrative of planning assumptions which includes a specific overview of enrollment/ADA, revenue, expense, deficit spending, fund balance, reserves, debt, and cash. This narrative should address and explain any changes between the Charter's Adopted Budget and First Interim projection.

- Excel file copy of the 2023-24 First Interim FCMAT Calculator.
- Cash flow projection with actuals through October 31, 2023 and projected cash from November through June 30, 2024. The District will provide the Cash Flow template. Charters may not use their own version of this form. Charters using the SACS software may use the template within the software or the District's Excel file. Cash flow reports should include applicable balance sheet object codes.
- Bank statement(s) or County Treasury cash report(s) for October 31, 2023 to support your ending cash through October 31, 2023 that is recorded on the cash flow projection.
- FORM Debt for all charters with current or projected debt.

# Coversheet

## CalPac Charter Extension 2023-24 Letters

**Section:** IX. Correspondence/Proposals/Reports  
**Item:** C. CalPac Charter Extension 2023-24 Letters  
**Purpose:** Discuss  
**Submitted by:** Christine Feher  
**Related Material:** CALPAC Charter Extension 2023.24 - Acton Agua Dulce.pdf  
2023-07-21\_Charter Term One-Year Extension - CSD Listservs.pdf

### BACKGROUND:

Per SB 114, signed by the Governor on July 10, 2023, EC Section 47607.4 was amended to extend the terms of charter schools. California Pacific Charter - Sonoma now expires on 6/30/2027. California Pacific Charter - Los Angeles and California Pacific Charter - San Diego now expire on 6/30/2028.



July 25, 2023

Re: Senate Bill 114

To whom it may concern:

I am writing on behalf of the Acton-Agua Dulce Unified School District as authorizer of CALPAC charter school. On July 10, 2023, the Governor signed SB 114, which amended EC Section 47607.4 to extend the terms of charter schools who expire on or between January 1, 2024, and June 30, 2027, by one additional year. We believe the new expiration date for your current term would be June 30, 2028. If you believe this date is incorrect, please contact me.

Neither the District nor your charter school will need to take any official action to update your charter petition's term. The CDE has automatically updated the charter terms for charter schools who are impacted by this extension.

The CDE has noted that no charter renewals should be heard before fiscal year 2024-25.

Please do not hesitate to contact me if you have any follow-up questions or concerns.

Sincerely,

*Nesha Pattison – Director of Charter Services*  
Acton-Agua Dulce Unified School District  
[www.aadusd.k12.ca.us](http://www.aadusd.k12.ca.us)  
P: 661-269-0750 | Extension #101  
[npattison@aadusd.k12.ca.us](mailto:npattison@aadusd.k12.ca.us)



**CALIFORNIA DEPARTMENT  
OF EDUCATION**

**TONY THURMOND**  
STATE SUPERINTENDENT OF  
PUBLIC INSTRUCTION

1430 N STREET, SACRAMENTO, CA 95814-5901 • 916-319-0800 • WWW.CDE.CA.GOV

July 21, 2023

Dear County and District Superintendents and Charter School Administrators:

**One-Year Extension of Charter School Terms**

During the 2021–22 Legislative Session, Assembly Bill 101 (Stats. 2021, Ch. 44, Sec. 58) added California *Education Code (EC)* 47607.4, extending all charter school terms that expired between January 1, 2022, and June 30, 2025, by two years. This was based on the lack of sufficient assessment data required under *EC* Section 47607 due to the ongoing pandemic and distance learning. The extensions to charter terms will permit renewals based upon the most current, post-pandemic assessments, and will allow charter school renewals to be based on the renewal tiers set out in *EC* sections 47607 and 47607.2.

On July 10, 2023, the Governor signed Senate Bill 114 (Stats. 2023, Ch.48, Sec. 43) which amended *EC* Section 47607.4 to extend the terms of charter schools who expire on or between January 1, 2024, and June 30, 2027, by one additional year. The California Department of Education (CDE) has automatically updated the charter terms for charter schools impacted by this extension. To view the expiration date of a charter school, visit the [Charter School Database](#).

With the extension of an additional year to charter schools' terms, no charter renewals should be heard before fiscal year 2024–25. All renewals are expected to be initiated at the conclusion of the year immediately preceding the final year of the charter school's term. The CDE recommends the process begin with sufficient time for appeals, if needed, before the charter term has expired.

Additional information regarding this subject is available at [Charter School Renewals](#). If you have any questions regarding this communication and/or charter school renewals, please contact the CDE Charter Schools Division via email at [charterrenewals@cde.ca.gov](mailto:charterrenewals@cde.ca.gov).

Sincerely,

/s/

Craig Heimbichner, Education Administrator  
Charter Schools Division

CH:sr



# Coversheet

## Consent - Business/Financial Services

**Section:** X. Consent  
**Item:** A. Consent - Business/Financial Services  
**Purpose:**  
**Submitted by:**  
**Related Material:** J.P. Morgan Statement June 30 2023.pdf  
J.P. Morgan Statement July 31 2023.pdf  
CalPac-LA Check Register June 2023.pdf  
CalPac-SD Check Register June 2023.pdf  
CalPac-SO Check Register June 2023.pdf  
CalPac-LA Check Register July 2023.pdf  
CalPac-SD Check Register July 2023.pdf  
CalPac-SO Check Register July 2023.pdf  
Hatch & Cesarios Agreement 2023-2024.pdf  
chromebooks for Board ewaste August 2023.pdf



JPMORGAN CHASE BANK NA  
 PO BOX 15918  
 MAIL SUITE DE1-1404  
 WILMINGTON DE 19850

<b>ACCOUNT NUMBER</b>	5563 7579 0010 0937
<b>PAYMENT DUE DATE</b>	07/25/2023
<b>AMOUNT DUE</b>	\$27,852.24
<b>CURRENT BALANCE</b>	\$27,852.24

Remit To: JPMORGAN CHASE BANK NA  
 P.O. BOX 4475  
 CAROL STREAM, IL 60197-4475

AMOUNT ENCLOSED \$
-----------------------

CALIFORNIA PACIFIC  
 SHANNON GREEN  
 4101 BIRCH STREET  
 SUITE 150  
 NEWPORT BEACH CA 92660-2236

\*\* 0000000

556375790010093702785224027852246

PLEASE TEAR PAYMENT COUPON AT PERFORATION

**STATEMENT MESSAGES**

**COMMERCIAL ACCOUNT SUMMARY**

ORGANIZATION NAME: CALIFORNIA PACIFIC  
 ACCOUNT NUMBER: 5563757900100937

CLOSING DATE 06-30-23  
 CREDIT LIMIT 100,000  
 AVAILABLE CREDIT 72,148

FOR CUSTOMER SERVICE CALL:  
 1-800-316-6056  
 FOR TTY/TDD SERVICE CALL:  
 1-800-955-8060

SEND BILLING INQUIRIES TO:  
 JPMORGAN CHASE BANK NA  
 COMMERCIAL CARD SOLUTIONS  
 P.O. BOX 2015  
 MAIL SUITE IL1-6225  
 ELGIN, IL 60121

PREVIOUS BALANCE	26,913.31
PURCHASES AND OTHER CHARGES	28,282.91
CASH ADVANCES	.00
CREDITS	430.67
PAYMENTS	26,913.31-
LATE PAYMENT CHARGES	.00
CASH ADVANCE FEE	.00
FINANCE CHARGES	.00
<b>NEW BALANCE</b>	<b>27,852.24</b>
TOTAL PAYMENT DUE	27,852.24
DISPUTED AMOUNT	.00

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**COMMERCIAL ACCOUNT ACTIVITY**

**CALIFORNIA PACIFIC**  
5563-7579-0010-0937

**TOTAL COMMERCIAL ACTIVITY**  
\$26,913.31CR

**ACCOUNTING CODE:**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-26	06-26		AUTO PAYMENT DEDUCTION	26,913.31 CR

**INDIVIDUAL CARDHOLDER ACTIVITY**

**CHRISTINE FEHER**  
5563-7500-1511-9595

**CREDITS**  
\$0.00

**PURCHASES**  
\$10,651.52

**CASH ADV**  
\$0.00

**TOTAL ACTIVITY**  
\$10,651.52

**ACCOUNTING CODE:**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-01	05-31	52231463151323148349975	GOOGLE *ADS3267517799 MOUNTAIN VIEW CA	500.00
06-02	06-01	15270213152001874235850	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	148.02
06-05	06-04	02682633156910008055601	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M50873219253 SALES TAX: 0.00	500.00
06-06	06-05	15270213156506364785855	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
06-07	06-06	02682633158910018011204	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M78031676743 SALES TAX: 0.00	500.00
06-09	06-08	52231463159323113896176	GOOGLE *ADS3267517799 MOUNTAIN VIEW CA	500.00
06-12	06-10	02682633162910008051024	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M97618932084 SALES TAX: 0.00	500.00
06-12	06-11	02682633163910009116627	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M96139589740 SALES TAX: 0.00	500.00
06-12	06-10	12302023161000004557747	MICROSOFT*ADVERTISING LAS VEGAS NV	1,001.96
06-14	06-13	02682633165910008045775	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M72084181056 SALES TAX: 0.00	500.00
06-15	06-15	55432863166207675379998	GOOGLE *ADS3267517799 650-253-0000 CA P.O.S.: P0S29gMj SALES TAX: 0.00	500.00
06-19	06-16	15270213167003100515850	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
06-19	06-18	15270213169001912615858	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
06-20	06-19	02682633171910037010214	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M53845228087 SALES TAX: 0.00	500.00
06-22	06-21	02682633173910006092852	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M93004454902 SALES TAX: 0.00	500.00
06-23	06-23	15270213174000720685858	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
06-26	06-25	15270213176001711445854	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
06-26	06-25	55131583176400993000299	MICROSOFT*ADVERTISING MSBILL.INFO NV P.O.S.: Z520XI4ILPGT SALES TAX: 0.00	1,001.54
06-27	06-27	02682633178910037010662	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M97749928504 SALES TAX: 0.00	500.00

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-29	06-28	15270213179002206525850	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
<b>Total Purchasing Activity</b>				<b>\$10,651.52</b>

<b>ALEXIS MORFIN</b> 5563-7500-4480-5891	<b>CREDITS</b> \$352.16	<b>PURCHASES</b> \$5,731.49	<b>CASH ADV</b> \$0.00	<b>TOTAL ACTIVITY</b> \$5,379.33
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**ACCOUNTING CODE:**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-01	05-30	55207393151310577547825	GRADUATIONSOURCE PORT CHESTER NY	49.94
06-05	06-02	55432863153204030904763	IN *USA CUSTOM PAD COR 607-5639550 NY P.O.S.: 123146306495224_1 SALES TAX: 0.00	514.35
06-08	06-06	05410193158069867818495	FEDEX OFFICE 800000836 PLANO TX P.O.S.: 142016860940501 SALES TAX: 25.37	299.62
06-08	06-07	05410193159091007612827	TARGET 00012385 IRVINE CA	47.54
06-12	06-09	55429503160717661225875	ADOBE *ACROPRO SUBS 4085366000 CA P.O.S.: 434G1H5P SALES TAX: 0.00	140.81
06-16	06-15	05345883167600034260404	LIVE CHAT 617-2752400 MA P.O.S.: 3104567 SALES TAX: 0.00	1,188.00
06-19	06-17	82711163169000000607722	COWRITER VOLO IL	4.99
06-20	06-19	55432863170209052992033	MYFAX SERVICE 866-563-9212 CA	12.00
06-20	06-19	55432863170209053350413	MYFAX SERVICE 866-563-9212 CA	25.00
06-21	06-19	55207393171310582668067	GRADUATIONSOURCE PORT CHESTER NY	41.38
06-26	06-23	55429503174715811007833	ADOBE *CREATIVE CLOUD 4085366000 CA P.O.S.: J4A42N1C SALES TAX: 0.00	1,664.91
06-27	06-26	55429503177717280660925	ADOBE *ACROPRO SUBS 4085366000 CA	204.39 CR
06-27	06-26	55429503177745281011996	ADOBE *ACROPRO SUBS 4085366000 CA	50.41 CR
06-28	06-27	52704873178700647817338	ADOBE ACROPRO SUBS 4085366000 CA P.O.S.: AD01030606310CUS SALES TAX: 0.00	5.44 CR
06-28	06-27	52704873178700647850438	ADOBE ACROPRO SUBS 4085366000 CA P.O.S.: BL2242167067 SALES TAX: 0.00	25.20 CR
06-29	06-28	52704873179700647922194	ADOBE ACROPRO SUBS 4085366000 CA P.O.S.: BL2487498520 SALES TAX: 0.00	23.23 CR
<b>Total Purchasing Activity</b>				<b>\$3,679.87</b>

**Travel Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-12	06-11	55500363162722947502583	HYATT REGENCY SONOMA W SANTA ROSA CA 15428430 ARRIVAL: 06-11-23	216.68
06-13	06-12	05410193163060158699283	ENTERPRISE RENT-A-CAR SANTA ROSA CA 953566762 SANTA RO	177.27

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Travel Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-13	06-11	55310203163036376216822	ALASKA A 0272337621682 SEATTLE WA MORFIN/ALEXIS DEPART: 06-11-23 P.O.S.: SALES TAX: \$0.00 SNA AS Q STS	30.00
06-13	06-12	55500363163722947899228	HYATT REGENCY SONOMA W SANTA ROSA CA 15745924 ARRIVAL: 06-11-23	216.68
06-13	06-11	55546503163750139823109	GROSSMANS SANTA ROSA CA	28.56
06-14	06-12	55429503164207324700015	CATTLEMEN'S #2 PETALUMA CA	1,029.70
06-14	06-12	55500363164722948812989	HYATT REGENCY SONOMA W SANTA ROSA CA 15747119 ARRIVAL: 06-11-23	18.00
<b>Total Travel Activity</b>				<b>\$1,716.89</b>

**Fleet Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-13	06-12	55432863163207035015772	CHEVRON 0305133 SANTA ROSA CA P.O.S.: M000001000001 SALES TAX: 1.87	13.11
<b>Total Fleet Activity</b>				<b>\$13.11</b>

**Miscellaneous Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-16	06-15	82711163166000019640105	ULTIMATE SLP FARMINGTON CT	12.95
06-27	06-26	15270213177268869088724	ADOBE INC 8008336687 CA	43.49 CR
<b>Total Miscellaneous Activity</b>				<b>\$30.54 CR</b>

<b>CHRISTINE FEHER</b> 5563-7580-2042-1526	<b>CREDITS</b> \$78.51	<b>PURCHASES</b> \$11,899.90	<b>CASH ADV</b> \$0.00	<b>TOTAL ACTIVITY</b> \$11,821.39
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**ACCOUNTING CODE:**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-01	05-31	82305093152000002481076	STAMPLI FOR 5-2023 MOUNTAIN VIEW CA	1,286.15
06-01	05-31	82711163151000017021313	CTECONFERENC-F52E177T1 LAGUNA NIGUEL CA	1,425.00
06-02	06-01	55436873152271523747849	CALIFORNIA STATE UNIVE LONG BEACH CA P.O.S.: 342816 SALES TAX: 0.00	353.62
06-07	06-06	55429503157717174775783	ADOBE *STOCK 4085366000 CA P.O.S.: D6XXKMZJ SALES TAX: 0.00	29.99
06-07	06-06	85454913157900012340814	NATL ALLIANCE PUBLIC 202-289-2700 DC P.O.S.: 797039 SALES TAX: 0.00	1,935.00
06-13	06-12	55480773163207555000891	ONTIMETEL DIALMYCALLS JUPITER FL	44.99
06-14	06-13	55429503164852018498218	AVENTRI LLC 2034039470 CT P.O.S.: 1849821 SALES TAX: 24.13	285.00
06-14	06-13	55436873164261647218609	CALIFORNIA STATE UNIVE LONG BEACH CA P.O.S.: 342816 SALES TAX: 0.00	353.62
06-15	06-14	55432863165207632111303	ABB*BOUDIN CATERING 415-283-1230 CA	200.48

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-16	06-16	15270213167001300143077	MSFT * E0800NUSI8 MSBILL.INFO WA	775.50
06-16	06-15	55436873166281664086299	PRIMO WATER TAMPA FL P.O.S.: 103154224 SALES TAX: 5.92	59.17
06-19	06-16	82711163167000020048453	SP BRANCH FURNITURE NEW YORK NY	752.10
06-22	06-21	55432863172209733909776	ABB*BOUDIN CATERING 415-283-1230 CA	80.19
06-23	06-22	82711163174000000586176	SP BRANCH FURNITURE NEW YORK NY	687.45
06-27	06-26	55429503177717280303583	ADOBE *STOCK 4085366000 CA	9.31 CR
06-28	06-26	75306373178176900528231	CAPIO - CA ASSOCIATION 530-9245444 CA	400.00
<b>Total Purchasing Activity</b>				<b>\$8,658.95</b>

**Telecommunication Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-19	06-17	55432863168208567064241	ATT*BILL PAYMENT 800-288-2020 TX P.O.S.: 323923130 SALES TAX: 0.00	203.30
<b>Total Activity</b>				<b>\$203.30</b>

**Travel Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-02	06-01	55429503153831029354506	EXTRA STORAGE NEWPO 714-437-9200 CA P.O.S.: 6478E34956940D279 SALES TAX: 36.96	462.00
06-08	06-07	02682633159910010007761	HOTELSCOM7257669636409 HOTELS.COM NV P.O.S.: 320012543021549 SALES TAX: 0.00	806.56
06-08	06-06	55432863158205419651003	UNITED 01624923260866 800-932-2732 TX BERRY/KATHERINEGRACE DEPART: 06-18-23 P.O.S.: SALES TAX: \$0.00 CMH UA S IAH UA S AUS UA S IAH UA S CMH	521.06
06-13	06-12	55432863163206974875881	HOTELSCOM7258042244720 HOTELS.COM WA P.O.S.: 0 SALES TAX: 0.00	363.14
06-19	06-15	55432863168208531943009	SOUTHWES 5262468231688 800-435-9792 TX PHIPPS/TYLER ERIC DEPART: 10-22-23 P.O.S.: SALES TAX: \$0.00 SAN WN S SMF WN J SAN	271.32
06-19	06-15	55432863168208531943017	SOUTHWES 5262468224710 800-435-9792 TX AMADOR/CORRIE JANILL DEPART: 10-22-23 P.O.S.: SALES TAX: \$0.00 SAN WN S SMF WN J SAN	271.32
06-19	06-15	55432863168208531943025	SOUTHWES 5262468217789 800-435-9792 TX AKRIDGE/EVANGELINE M DEPART: 10-22-23 P.O.S.: SALES TAX: \$0.00 SAN WN S SMF WN J SAN	271.32
<b>Total Travel Activity</b>				<b>\$2,966.72</b>

**Miscellaneous Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
06-19	06-17	12302023168000038836722	MAILCHIMP ATLANTA GA	61.62
06-27	06-26	15270213177261589380133	ADOBE INC 8008336687 CA	69.20 CR

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Miscellaneous Activity**

<b>Post Date</b>	<b>Tran Date</b>	<b>Reference Number</b>	<b>Transaction Description</b>	<b>Amount</b>
			<b>Total Miscellaneous Activity</b>	<b>\$7.58 CR</b>



JPMORGAN CHASE BANK NA  
 PO BOX 15918  
 MAIL SUITE DE1-1404  
 WILMINGTON DE 19850

<b>ACCOUNT NUMBER</b>	5563 7579 0010 0937
<b>PAYMENT DUE DATE</b>	08/25/2023
<b>AMOUNT DUE</b>	\$47,815.94
<b>CURRENT BALANCE</b>	\$47,815.94

Remit To: JPMORGAN CHASE BANK NA  
 P.O. BOX 4475  
 CAROL STREAM, IL 60197-4475

AMOUNT ENCLOSED \$
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CALIFORNIA PACIFIC  
 SHANNON GREEN  
 4101 BIRCH STREET  
 SUITE 150  
 NEWPORT BEACH CA 92660-2236

\*\* 0000000

556375790010093704781594047815948

PLEASE TEAR PAYMENT COUPON AT PERFORATION

**STATEMENT MESSAGES**

**COMMERCIAL ACCOUNT SUMMARY**

ORGANIZATION NAME: CALIFORNIA PACIFIC  
 ACCOUNT NUMBER: 5563757900100937

CLOSING DATE 07-31-23  
 CREDIT LIMIT 100,000  
 AVAILABLE CREDIT 52,184

FOR CUSTOMER SERVICE CALL:  
 1-800-316-6056  
 FOR TTY/TDD SERVICE CALL:  
 1-800-955-8060

SEND BILLING INQUIRIES TO:  
 JPMORGAN CHASE BANK NA  
 COMMERCIAL CARD SOLUTIONS  
 P.O. BOX 2015  
 MAIL SUITE IL1-6225  
 ELGIN, IL 60121

PREVIOUS BALANCE	27,852.24
PURCHASES AND OTHER CHARGES	48,498.04
CASH ADVANCES	.00
CREDITS	682.10
PAYMENTS	27,852.24-
LATE PAYMENT CHARGES	.00
CASH ADVANCE FEE	.00
FINANCE CHARGES	.00
<b>NEW BALANCE</b>	<b>47,815.94</b>
TOTAL PAYMENT DUE	47,815.94
DISPUTED AMOUNT	.00



ACCT. NUMBER: 5563 7579 0010 0937	CALIFORNIA PACIFIC
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**COMMERCIAL ACCOUNT ACTIVITY**

<b>CALIFORNIA PACIFIC</b> 5563-7579-0010-0937  <b>ACCOUNTING CODE:</b>	<b>TOTAL COMMERCIAL ACTIVITY</b> \$27,852.24CR										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Post Date</th> <th style="width: 10%;">Tran Date</th> <th style="width: 20%;">Reference Number</th> <th style="width: 50%;">Transaction Description</th> <th style="width: 10%;">Amount</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">07-25</td> <td style="text-align: center;">07-25</td> <td></td> <td>AUTO PAYMENT DEDUCTION</td> <td style="text-align: right;">27,852.24 CR</td> </tr> </tbody> </table>	Post Date	Tran Date	Reference Number	Transaction Description	Amount	07-25	07-25		AUTO PAYMENT DEDUCTION	27,852.24 CR	
Post Date	Tran Date	Reference Number	Transaction Description	Amount							
07-25	07-25		AUTO PAYMENT DEDUCTION	27,852.24 CR							

**INDIVIDUAL CARDHOLDER ACTIVITY**

<b>DAISY CARLOS</b> 5563-7500-0267-7217  <b>ACCOUNTING CODE:</b>	<b>CREDITS</b> \$0.00	<b>PURCHASES</b> \$2,498.17	<b>CASH ADV</b> \$0.00	<b>TOTAL ACTIVITY</b> \$2,498.17
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**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-12	07-11	82711163192000015467758	YOUNG, MINNEY & CORR SACRAMENTO CA	75.00
07-12	07-11	82711163192000015574728	YOUNG, MINNEY & CORR SACRAMENTO CA	75.00
07-18	07-17	82711163199000000490396	COWRITER VOLO IL	4.99
07-20	07-19	55432863200205356695607	MYFAX SERVICE 866-563-9212 CA	12.00
07-20	07-19	55432863200205356907416	MYFAX SERVICE 866-563-9212 CA	25.00
07-20	07-20	55432863201205473791692	CALIFORNIA CONSORTIUM 916-521-1136 CA P.O.S.: 0000000000000000 SALES TAX: 0.00	225.00
07-25	07-24	02305373206600064995721	USPS CHANGE OF ADDRESS 800-2383150 TN P.O.S.: pmgcom381925050 SALES TAX: 0.00	5.50
<b>Total Purchasing Activity</b>				<b>\$422.49</b>

**Travel Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-13	07-12	55240373194091027000371	BOUDIN SF METRO POINTE COSTA MESA CA	14.94
07-20	07-19	55432863200205359889637	SQ *THE KEBAB SHOP GOSQ.COM CA P.O.S.: 00011529215129901 SALES TAX: 11.24	189.68
07-20	07-18	55432863200205410070078	SOUTHWES 5262480226690 800-435-9792 TX GREEN/SHANNON STEVEN DEPART: 09-12-23 P.O.S.: SALES TAX: \$0.00 SMF WN J SNA WN F SMF	166.96
07-20	07-18	55432863200205410070086	SOUTHWES 5262480178928 800-435-9792 TX SPEAKMAN/ERIN DEPART: 10-22-23 P.O.S.: SALES TAX: \$0.00 SAN WN M SMF WN J SAN	302.96
07-21	07-19	55310203201036413961988	ALASKA A 0272341396198 SEATTLE WA AKRIDGE/EVANGELINE DEPART: 09-21-23 P.O.S.: SALES TAX: \$0.00 SAN AS N STS AS N SAN	258.00
07-28	07-27	52708063209700208011930	AVIS.COM PREPAY 8003527900 VA 208011930 SANTA AN	304.63

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Travel Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-31	07-27	55432863209208112599916	UNITED 01623153407293 800-932-2732 TX BERRY/KATHERINEG DEPART: 08-14-23 P.O.S.: SALES TAX: \$0.00 CMH UA K IAH UA K SNA UA K IAH UA K CMH	366.60
07-31	07-27	55432863209208174194853	SOUTHWES 5264207776079 800-435-9792 TX WYLIE/KELLY CARIN DEPART: 07-27-23 P.O.S.: SALES TAX: \$0.00 SJC WN Y SNA	25.00
07-31	07-27	55432863209208174194861	SOUTHWES 5262483612932 800-435-9792 TX WYLIE/KELLY CARIN DEPART: 08-08-23 P.O.S.: SALES TAX: \$0.00 ONT WN S SJC	208.98
07-31	07-27	55432863209208174194879	SOUTHWES 5264207776439 800-435-9792 TX WYLIE/KELLY CARIN DEPART: 07-27-23 P.O.S.: SALES TAX: \$0.00 ONT WN Y SJC	15.00
07-31	07-27	55432863209208174194887	SOUTHWES 5262483610685 800-435-9792 TX WYLIE/KELLY CARIN DEPART: 08-08-23 P.O.S.: SALES TAX: \$0.00 SJC WN S SNA	209.98
<b>Total Travel Activity</b>				<b>\$2,062.73</b>

**Miscellaneous Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-17	07-15	82305093196000017945477	ULTIMATE SLP FARMINGTON CT	12.95
<b>Total Miscellaneous Activity</b>				<b>\$12.95</b>

<b>CHRISTINE FEHER</b> 5563-7500-1511-9595	<b>CREDITS</b> \$0.00	<b>PURCHASES</b> \$36,918.79	<b>CASH ADV</b> \$0.00	<b>TOTAL ACTIVITY</b> \$36,918.79
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**ACCOUNTING CODE:**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-03	07-01	02682633183910009387307	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M76179702661 SALES TAX: 0.00	204.55
07-03	06-30	15270213181002251525850	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-04	07-03	15270213184521765475853	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-06	07-05	02682633187910003111493	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M29718716057 SALES TAX: 0.00	500.00
07-07	07-06	02682633188910006136819	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M42270062555 SALES TAX: 0.00	500.00
07-10	07-08	02682633190910012011135	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M11393137693 SALES TAX: 0.00	500.00
07-11	07-10	02682633192910004102908	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M87871394363 SALES TAX: 0.00	500.00
07-13	07-12	15270213193001673465857	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-13	07-12	55131583193400992001172	MICROSOFT*ADVERTISING MSBILL.INFO NV P.O.S.: Z51YYHS899SH SALES TAX: 0.00	712.03

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-14	07-14	15270213195000290605851	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-17	07-14	02682633196910018011943	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M61844792965 SALES TAX: 0.00	500.00
07-17	07-15	02682633197910009123292	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M56727988972 SALES TAX: 0.00	500.00
07-17	07-16	15270213197000807895852	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-17	07-17	15270213198277895365852	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-18	07-17	02682633199910004117487	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M24819587694 SALES TAX: 0.00	500.00
07-18	07-18	15270213199000142375857	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-19	07-18	02682633200910004124605	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M74540985801 SALES TAX: 0.00	500.00
07-20	07-19	02682633201910005049446	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M50453357778 SALES TAX: 0.00	500.00
07-20	07-19	02682633201910005123985	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M84645583790 SALES TAX: 0.00	500.00
07-20	07-19	15270213200001596805859	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-20	07-20	15270213200002546665856	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-20	07-20	15270213201000467075856	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-21	07-20	02682633202910008106432	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M10842883012 SALES TAX: 0.00	500.00
07-21	07-20	02682633202910008109402	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M84305289310 SALES TAX: 0.00	500.00
07-21	07-20	02682633202910008129475	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M21563213154 SALES TAX: 0.00	500.00
07-21	07-20	02682633202910012011248	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M54333316321 SALES TAX: 0.00	500.00
07-21	07-21	15270213202000020185852	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-21	02682633203910009047600	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M30391925764 SALES TAX: 0.00	500.00
07-24	07-21	02682633203910009048426	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M22464446789 SALES TAX: 0.00	500.00
07-24	07-22	02682633204910008051982	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M16445327174 SALES TAX: 0.00	500.00
07-24	07-22	02682633204910008052428	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M38430589204 SALES TAX: 0.00	500.00
07-24	07-23	02682633205910030009056	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M41312560471 SALES TAX: 0.00	500.00
07-24	07-21	15270213202001698915851	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-21	15270213202002089395851	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-22	15270213202002518085859	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-22	15270213203001655785858	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-24	07-23	15270213203002460545859	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-23	15270213204000391955857	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-23	15270213204000645835855	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-23	15270213204001441605856	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-23	15270213204001835715857	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-24	07-24	15270213205000618045853	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-25	07-24	02682633206910003045649	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M96154403008 SALES TAX: 0.00	500.00
07-25	07-24	02682633206910003045797	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M22521034296 SALES TAX: 0.00	500.00
07-25	07-24	02682633206910003105336	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M51605937834 SALES TAX: 0.00	500.00
07-25	07-24	02682633206910013009445	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M40265447175 SALES TAX: 0.00	500.00
07-25	07-24	15270213205291643285859	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-25	07-24	15270213205291973735853	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-25	07-24	15270213205292627065853	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-25	07-25	15270213206000103905859	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-26	07-25	02682633207910005105820	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M95311539742 SALES TAX: 0.00	500.00
07-26	07-25	02682633207910005126396	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M27246541020 SALES TAX: 0.00	500.00
07-26	07-25	02682633207910015011497	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M08547187608 SALES TAX: 0.00	500.00
07-26	07-25	02682633207910033010042	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M37216857202 SALES TAX: 0.00	500.00
07-27	07-26	02682633208910008071424	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M46175289935 SALES TAX: 0.00	500.00
07-27	07-26	15270213207002082595858	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-27	07-27	15270213207002563345856	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-27	07-27	15270213208000199175852	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-27	07-27	15270213208000754375855	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-28	07-27	02682633209910009097724	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M34364543736 SALES TAX: 0.00	500.00
07-28	07-27	02682633209910013011141	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M40891807604 SALES TAX: 0.00	500.00
07-28	07-28	15270213209001178485857	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-31	07-28	02682633210910007055655	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M51992253573 SALES TAX: 0.00	500.00

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-31	07-28	02682633210910012012402	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M84667606333 SALES TAX: 0.00	500.00
07-31	07-29	02682633211910006044634	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M90299740175 SALES TAX: 0.00	500.00
07-31	07-29	02682633211910006091189	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M66746060598 SALES TAX: 0.00	500.00
07-31	07-30	02682633212910002043316	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M17457374438 SALES TAX: 0.00	500.00
07-31	07-30	02682633212910036007345	GOOGLE*ADS3267517799 CC GOOGLE.COM CA P.O.S.: M36404265560 SALES TAX: 0.00	500.00
07-31	07-29	12302023210000081883553	MICROSOFT*ADS-F1083MWA LAS VEGAS NV	1,002.21
07-31	07-29	15270213210002078655851	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-31	07-30	15270213211000130495851	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-31	07-30	15270213211001365115859	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
07-31	07-31	15270213212000455465850	GOOGLE ADS3267517799 MOUNTAIN VIEW CA	500.00
<b>Total Purchasing Activity</b>				<b>\$36,918.79</b>

<b>ALEXIS MORFIN</b> 5563-7500-4480-5891	<b>CREDITS</b> \$0.00	<b>PURCHASES</b> \$239.88	<b>CASH ADV</b> \$0.00	<b>TOTAL ACTIVITY</b> \$239.88
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ACCOUNTING CODE:

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-10	07-08	55429503189719037937594	ADOBE *ACROPRO SUBS 4085366000 CA P.O.S.: 96AZS39A SALES TAX: 0.00	239.88
<b>Total Purchasing Activity</b>				<b>\$239.88</b>

<b>CHRISTINE FEHER</b> 5563-7580-2042-1526	<b>CREDITS</b> \$682.10	<b>PURCHASES</b> \$8,841.20	<b>CASH ADV</b> \$0.00	<b>TOTAL ACTIVITY</b> \$8,159.10
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ACCOUNTING CODE:

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-03	06-30	82305093182000003896979	STAMPLI FOR 6-2023 MOUNTAIN VIEW CA	1,295.80
07-03	06-29	85140513181900013200098	CALIFORNIA ASSOCIATION 9098155222 CA P.O.S.: Vt8qjaov6Mpxwt1d8 SALES TAX: 0.00	599.00
07-11	07-10	82711163192000005030806	SP BRANCH FURNITURE NEW YORK NY	341.05 CR
07-11	07-10	82711163192000005043221	SP BRANCH FURNITURE NEW YORK NY	341.05 CR
07-12	07-11	82711163193000000290123	WWW.SCHOLARLEAD.COM DENVER CO	1,200.00
07-13	07-12	55480773193207555000804	ONTIMETEL DIALMYCALLS JUPITER FL	44.99
07-14	07-13	55436873194281941324238	PRIMO WATER TAMPA FL P.O.S.: 103899218 SALES TAX: 11.03	110.31
07-17	07-16	15270213197000001078263	MSFT * E080009515 MSBILL.INFO WA	789.61

ACCT. NUMBER: 5563 7579 0010 0937

CALIFORNIA PACIFIC

**INDIVIDUAL CARDHOLDER ACTIVITY**

**Purchasing Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-19	07-18	55429503199743587180429	ADOBE *ACROPRO SUBS 4085366000 CA P.O.S.: JADBWCNN SALES TAX: 0.00	112.35
07-25	07-25	12302023206000230015855	CALIFORNIA SCHOOL PUBL 9498877844 TX P.O.S.: WTJ5MWcxRsinbHRMgLzriw SALES TAX: 0.00	400.00
07-31	07-29	55429503210715181293639	CUSTOMINK LLC 8002934232 VA P.O.S.: BNP5ER5N SALES TAX: 256.22	3,562.22
<b>Total Purchasing Activity</b>				<b>\$7,432.18</b>

**Telecommunication Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-17	07-16	55432863197204518908086	ATT*BILL PAYMENT 800-288-2020 TX P.O.S.: 323923130 SALES TAX: 0.00	203.30
<b>Total Activity</b>				<b>\$203.30</b>

**Travel Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-03	07-01	55429503183831011395503	EXTRA STORAGE NEWPO 714-437-9200 CA P.O.S.: 64A05D06AF20E2786 SALES TAX: 36.96	462.00
<b>Total Travel Activity</b>				<b>\$462.00</b>

**Miscellaneous Activity**

Post Date	Tran Date	Reference Number	Transaction Description	Amount
07-17	07-17	12302023198000035583727	MAILCHIMP ATLANTA GA	61.62
<b>Total Miscellaneous Activity</b>				<b>\$61.62</b>

**Company name:** California Pacific Charter - Los Angeles  
**Report name:** Check register  
**Created on:** 7/3/2023  
**Location:** 55--California Pacific Charter - Los Angeles

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Ch</b>	<b>Account no: 505911781</b>					
	6/1/2023	EECS000--Effectual Educational Consulting Services	20137001771	1,150.00	Adaptive PE services March 2023	55--California Pacific Charter - Los Angeles
	6/1/2023	EECS000--Effectual Educational Consulting Services	20137001768	755.00	Adaptive PE & Speech & Language April 2023	55--California Pacific Charter - Los Angeles
	6/1/2023	PITN000--Pitney Bowes Global Financial Services LLC	20137001767	74.70	Postage Machine lease - July 1 - Sept 8 2023	55--California Pacific Charter - Los Angeles
		PITN000--Pitney Bowes Global Financial Services LLC	20137001767	24.90	Postage Machine lease - June 8 - 30 2023	55--California Pacific Charter - Los Angeles
	6/1/2023	HATC000--Hatch & Cesario, Attorneys-at-Law	20137001773	192.00	Legal Services for April 2023	55--California Pacific Charter - Los Angeles
	6/1/2023	AMAZ000--Amazon	20137001774	50.04	Office supplies for shipping	55--California Pacific Charter - Los Angeles
	6/1/2023	HATC000--Hatch & Cesario, Attorneys-at-Law	20137001772	48.24	Legal Services for April 2023	55--California Pacific Charter - Los Angeles
	6/1/2023	AMAZ000--Amazon	20137001775	30.31	Mini printer for field trip	55--California Pacific Charter - Los Angeles
	6/1/2023	AMAZ000--Amazon	20137001776	13.49	Cable chargers for office	55--California Pacific Charter - Los Angeles
	6/5/2023	DELA000--De Lage Landen Financial Services Inc.	101370962	173.47	Copier Lease for June 2023	55--California Pacific Charter - Los Angeles
	6/5/2023	MAVE001--Maverick Label	101370966	128.87	Asset tags for equipment	55--California Pacific Charter - Los Angeles
	6/5/2023	JENN005--Jennifer Davis	101370963	44.44	SPED In-Person Workshop (March 2023) - Mileage	55--California Pacific Charter - Los Angeles
	6/5/2023	CEAN001--Cean Colcord	101370965	41.47	SPED In-Person Workshop (March 2023) - Mileage	55--California Pacific Charter - Los Angeles
	6/5/2023	JENN003--Jenny Chung	101370964	28.49	Underwood Farms Field Trip Mileage	55--California Pacific Charter - Los Angeles
	6/5/2023	APLU000--APLUS+	20137001777	4,899.38	Membership for 2023-24 school year	55--California Pacific Charter - Los Angeles
	6/5/2023	CHAR001--Charter Impact	101370961	1,256.25	Payroll Services May 2023	55--California Pacific Charter - Los Angeles
	6/6/2023	ARNE001--A&R Parcel Three	1571785312TC	2,635.11	June 2023 Rent	55--California Pacific Charter - Los Angeles
	6/6/2023	MICH001--Michelle Ignacio	20137001783	131.91	TPT Resources for Classroom	55--California Pacific Charter - Los Angeles
	6/6/2023	JILLT001--Jill Tanner	20137001782	45.09	Mileage Classified Staff Luncheon	55--California Pacific Charter - Los Angeles
	6/6/2023	MICH001--Michelle Ignacio	20137001781	42.79	SPED In-Person Workshop (March 2023) - Mileage	55--California Pacific Charter - Los Angeles
	6/6/2023	JILL001--Jill Stubbs	20137001779	77.29	Mileage for Underwood Farms Field Trip	55--California Pacific Charter - Los Angeles
	6/6/2023	HEAT001--Heather Goldbach	20137001780	30.35	SPED In-Person Workshop (March 2023) - Mileage	55--California Pacific Charter - Los Angeles
6/7/2023	WORL000--Worldwide Express	101370970	318.64	Shipping for CPC-LA	55--California Pacific Charter - Los Angeles	
6/7/2023	ALPH000--Alpha Vision, Inc.	101370969	190.45	June 2023- CalPac Datto Monthly Backupify G - Suite Cloud to Cloud Email and Dr	55--California Pacific Charter - Los Angeles	

**Company name:** California Pacific Charter - Los Angeles  
**Report name:** Check register  
**Created on:** 7/3/2023  
**Location:** 55--California Pacific Charter - Los Angeles

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Ch</b>	<b>Account no: 505911781</b>					
	6/7/2023	CALI003--CaliforniaChoice	101370968	33,606.49	July 2023 Medical Premiums	55--California Pacific Charter - Los Angeles
	6/7/2023	HOLI002--Holiday Inn Diamond Bar	101370967	199.74	Facility rental for board meeting on 6/20	55--California Pacific Charter - Los Angeles
	6/8/2023	CLIF000--Clifton Larson Allen LLP	20137001789	1,846.69	Progress billing for audit services through June 30, 2023	55--California Pacific Charter - Los Angeles
	6/8/2023	PHIL000--Philadelphia Insurance Companies	20137001788	2.01	22/23 True-Up	55--California Pacific Charter - Los Angeles
	6/8/2023	ERIC001--Ericka Zemmer	20137001787	30.28	SPED In-Person Workshop (March 2023) - Mileage	55--California Pacific Charter - Los Angeles
		ERIC001--Ericka Zemmer	20137001787	48.05	Office Visit Mileage	55--California Pacific Charter - Los Angeles
		ERIC001--Ericka Zemmer	20137001787	36.86	America's Symposium Mileage	55--California Pacific Charter - Los Angeles
		ERIC001--Ericka Zemmer	20137001787	35.81	SPED In-Person Workshop (March 2023) - Dinner	55--California Pacific Charter - Los Angeles
	6/8/2023	KMED001--KM Educational Consulting and Executive Coaching Services	20137001785	489.94	Professional Services for May	55--California Pacific Charter - Los Angeles
	6/9/2023	ZOOM000--Zoom	20137001790	251.25	Zoom Storage of 5TB Difference	55--California Pacific Charter - Los Angeles
	6/12/2023	EMHS000--EMH Sports USA, Inc.	101370973	475.00	APE SERVICES MAY 2023	55--California Pacific Charter - Los Angeles
	6/12/2023	JANE000--Janet E. Kohtz	101370972	315.00	VISION THERAPY MAY 2023	55--California Pacific Charter - Los Angeles
	6/13/2023	RING000--RingCentral	20137001795	1,635.36	Monthly phone bill - May 2023	55--California Pacific Charter - Los Angeles
	6/13/2023	TSWT000--TSW Therapy, Inc.	20137001797	1,478.15	OT Services May 2023	55--California Pacific Charter - Los Angeles
	6/13/2023	KATI002--Katie Hawck	20137001799	246.43	Avis Car Rental	55--California Pacific Charter - Los Angeles
		KATI002--Katie Hawck	20137001799	52.40	Meals during trip	55--California Pacific Charter - Los Angeles
		KATI002--Katie Hawck	20137001799	51.99	Uber/Lyft Rides	55--California Pacific Charter - Los Angeles
		KATI002--Katie Hawck	20137001799	49.35	Gas for Rented Car	55--California Pacific Charter - Los Angeles
		KATI002--Katie Hawck	20137001799	89.52	Hyatt Hotel Stay	55--California Pacific Charter - Los Angeles
	6/13/2023	DANI001--Danielle Carbonetta	20137001793	7.29	America's Best Symposium - Dinner	55--California Pacific Charter - Los Angeles
		DANI001--Danielle Carbonetta	20137001793	16.83	Baqels for Morning Meeting	55--California Pacific Charter - Los Angeles
		DANI001--Danielle Carbonetta	20137001793	74.91	Mileage for Various Occasions	55--California Pacific Charter - Los Angeles
	6/13/2023	IRON000--Iron Mountain	20137001796	88.73	May 2023 Storage	55--California Pacific Charter - Los Angeles
	6/13/2023	SHAN000--Shannon Green	20137001800	15.04	Mileage to SMF Airport	55--California Pacific Charter - Los Angeles
		SHAN000--Shannon Green	20137001800	9.05	SMF Airport Parking - Office Meeting	55--California Pacific Charter - Los Angeles
		SHAN000--Shannon Green	20137001800	29.05	Lyft from Airport - Office Meeting	55--California Pacific Charter - Los Angeles
	6/13/2023	AMAZ000--Amazon	20137001801	49.51	Office supplies for filming interviews	55--California Pacific Charter - Los Angeles
	6/13/2023	TYLE001--Tyler Phipps	20137001791	43.11	CTE Field Trip - Disneyland	55--California Pacific Charter - Los Angeles
	6/13/2023	AMAZ000--Amazon	20137001804	18.99	Office supplies	55--California Pacific Charter - Los Angeles
	6/14/2023	ALLS001--All Systems Go!	101370974	1,170.79	Marketing for May 2023	55--California Pacific Charter - Los Angeles
	6/14/2023	PART000--Partners in Special Education	101370977	195.00	OT SERVICES APRIL 2023	55--California Pacific Charter - Los Angeles



**Company name:** California Pacific Charter - Los Angeles  
**Report name:** Check register  
**Created on:** 7/3/2023  
**Location:** 55--California Pacific Charter - Los Angeles

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Ch</b>	<b>Account no: 505911781</b>					
	6/15/2023	AMAZ000--Amazon	20137001819	40.31	Office Supplies	55--California Pacific Charter - Los Angeles
	6/15/2023	AMAZ000--Amazon	20137001820	3.78	Keychains for Office Keys	55--California Pacific Charter - Los Angeles
	6/15/2023	BOAR001--BoardOnTrack, Inc.	20137001816	2,497.50	Board on Track Renewal 23-24	55--California Pacific Charter - Los Angeles
	6/15/2023	AMAZ000--Amazon	20137001812	7.41	Office supplies	55--California Pacific Charter - Los Angeles
	6/15/2023	WILL000--William J Howard Jr.	20137001805	50.22	Board Meeting Mileage - May 9	55--California Pacific Charter - Los Angeles
	6/15/2023	JASO000--Jason D. McFaul	20137001806	5.96	Board Meeting Mileage - May 9	55--California Pacific Charter - Los Angeles
	6/20/2023	YMCL000--Law Offices of Young, Minney & Corr. LLP	101370981	1,054.50	Legal Services for May 2023	55--California Pacific Charter - Los Angeles
	6/20/2023	BASS001--Wendell M. Bass Jr.	101370982	326.63	Equity Professional Development June 2023	55--California Pacific Charter - Los Angeles
	6/20/2023	WORL000--Worldwide Express	101370980	85.00	Shipping for CPC-LA	55--California Pacific Charter - Los Angeles
	6/20/2023	WORL000--Worldwide Express	101370979	113.12	Shipping for CPC-LA	55--California Pacific Charter - Los Angeles
	6/20/2023	ECCI000--ECC Imaging LLC.	101370983	7.01	05/11/23 to 06/10/23 coverage period	55--California Pacific Charter - Los Angeles
	6/21/2023	HATC000--Hatch & Cesario, Attorneys-at-Law	20137001839	611.04	Legal Services for Feb	55--California Pacific Charter - Los Angeles
	6/21/2023	BUCH001--Buchalter	20137001841	209.29	Legal Services for April	55--California Pacific Charter - Los Angeles
	6/21/2023	BUCH001--Buchalter	20137001840	154.84	Legal Services for March	55--California Pacific Charter - Los Angeles
	6/22/2023	JASO000--Jason D. McFaul	1019769663	200.00	June 2023 Board Stipends - JM	55--California Pacific Charter - Los Angeles
	6/22/2023	WILL000--William J Howard Jr.	1019769664	200.00	June 2023 Board Stipends - WH	55--California Pacific Charter - Los Angeles
	6/22/2023	TANY001--Tanya Rogers	1019769669	200.00	June 2023 Board Stipends - TR	55--California Pacific Charter - Los Angeles
	6/22/2023	KELL000--Kelly Wylie	1019769666	200.00	June 2023 Board Stipends - KW	55--California Pacific Charter - Los Angeles
	6/22/2023	SHIR000--Shirley Peterson	1019769668	200.00	June 2023 Board Stipends - SP	55--California Pacific Charter - Los Angeles
	6/22/2023	RAYM000--Raymond Allyn Office Furniture		3,109.21	Furniture for the office	55--California Pacific Charter - Los Angeles
	6/23/2023	WORL000--Worldwide Express	101370984	88.17	Shipping for CPC-LA	55--California Pacific Charter - Los Angeles
	6/23/2023	OXFO000--Oxford Consulting Services, Inc.	20137001843	214.00	PT SERVICES MAY	55--California Pacific Charter - Los Angeles
		OXFO000--Oxford Consulting Services, Inc.	20137001843	2,062.50	BCBA SERVICES MAY	55--California Pacific Charter - Los Angeles
	6/26/2023	PROC000--Procopio, Cory, Hargreaves & Savitch LLP	20137001846	2,678.38	Legal Services for May 2023	55--California Pacific Charter - Los Angeles
	6/26/2023	HATC000--Hatch & Cesario, Attorneys-at-Law	20137001847	1,455.50	Legal Services for May 2023	55--California Pacific Charter - Los Angeles
	6/26/2023	PROC000--Procopio, Cory, Hargreaves & Savitch LLP	20137001845	661.94	Legal Services for May 2023	55--California Pacific Charter - Los Angeles

**Company name:** California Pacific Charter - Los Angeles  
**Report name:** Check register  
**Created on:** 7/3/2023  
**Location:** 55--California Pacific Charter - Los Angeles

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Ch</b>	<b>Account no: 505911781</b>					
	6/26/2023	HATC000--Hatch & Cesario, Attorneys-at-Law	20137001848	176.88	Legal Services for May 2023	55--California Pacific Charter - Los Angeles
	6/27/2023	ANNI000--Annie Canosa	10255	1,638.00	CANOSA, ANNIE M Salary Expense - Off Salary Schedule	55--California Pacific Charter - Los Angeles
	6/28/2023	CHAR001--Charter Impact	101370986	1,256.25	Payroll Services June 2023	55--California Pacific Charter - Los Angeles
	6/29/2023	OVER000--OverDrive, Inc.	20137001852	1,000.00	SORA library Ebooks and Audiobooks	55--California Pacific Charter - Los Angeles
	6/29/2023	BUCH001--Buchalter	20137001850	215.27	Legal Services for October 2022	55--California Pacific Charter - Los Angeles
	6/29/2023	BUCH001--Buchalter	20137001851	82.06	Legal Services for April 2023	55--California Pacific Charter - Los Angeles
	6/30/2023	JILL001--Jill Stubbs	20137001876	100.22	UPK Park Day Field Trip STUBBS, JILL	55--California Pacific Charter - Los Angeles
	6/30/2023	JENN005--Jennifer Davis	101370994	29.34	Mileage for OT Eval for J Davis	55--California Pacific Charter - Los Angeles
	6/30/2023	STAP001--Staples Technology Solutions	20137001874	2,223.48	Lenovo Thinkpad for Corrie Amador	55--California Pacific Charter - Los Angeles
	6/30/2023	EECS000--Effectual Educational Consulting Services	20137001870	920.00	ADAPTIVE PE SERVICES MAY 2023	55--California Pacific Charter - Los Angeles
	6/30/2023	PROC000--Procopio, Cory, Hargreaves & Savitch LLP	20137001873	257.78	Legal Services for June 2023 - Arbitration Fees	55--California Pacific Charter - Los Angeles
	6/30/2023	ERIC001--Ericka Zemmer	20137001875	44.10	Mileage for Board Meeting 06/13/23	55--California Pacific Charter - Los Angeles
	6/30/2023	BUCH001--Buchalter	20137001872	37.38	Legal Services for May 2023	55--California Pacific Charter - Los Angeles
	6/30/2023	VANG000--Vanqie Akridaqe	20137001871	8.49	Mileage to NCUST Conference	55--California Pacific Charter - Los Angeles
	6/30/2023	MELI001--Melissa Bearup	101370993	130.59	Sped Protocols	55--California Pacific Charter - Los Angeles
		MELI001--Melissa Bearup	101370993	281.11	Desk Request	55--California Pacific Charter - Los Angeles
	6/30/2023	MICH001--Michelle Ignacio	20137001865	81.66	TPT Resources for Classroom	55--California Pacific Charter - Los Angeles
	6/30/2023	CORR001--Corrie Amador	20137001866	65.30	Board Meeting Mileage 6/13/23	55--California Pacific Charter - Los Angeles
	6/30/2023	ROMY001--Romy Fay-Mason	20137001867	44.10	Mileage for Office Visit	55--California Pacific Charter - Los Angeles
		ROMY001--Romy Fay-Mason	20137001867	8.66	Toll Roads Reimbursement	55--California Pacific Charter - Los Angeles
	6/30/2023	ALIC001--Alice Pak	20137001868	13.75	Mileage for Graduation	55--California Pacific Charter - Los Angeles
	6/30/2023	JANE001--Jane Willson	101370991	12.05	SoCal Grad Mileage	55--California Pacific Charter - Los Angeles
	6/30/2023	KELL001--Kelly Rocha	101370992	12.05	SoCal Grad Miles	55--California Pacific Charter - Los Angeles
	6/30/2023	SHEL001--Shelby Sullivan	101370989	2.01	Teachers Pay Teachers Educational Resources for Classroom	55--California Pacific Charter - Los Angeles
		SHEL001--Shelby Sullivan	101370989	10.93	Working Lunch Meeting	55--California Pacific Charter - Los Angeles
		SHEL001--Shelby Sullivan	101370989	46.44	Graduation Mileage	55--California Pacific Charter - Los Angeles
	6/30/2023	ALEX000--Alexis Morfin	101370990	15.59	SoCal Grad Mileage	55--California Pacific Charter - Los Angeles
	6/30/2023	DAIS001--Daisuke Nishikawa	101370988	9.86	MILEAGE CALPAC GRADUATION NISHIKAWA, DAISUKE	55--California Pacific Charter - Los Angeles

**Company name:** California Pacific Charter - Los Angeles  
**Report name:** Check register  
**Created on:** 7/3/2023  
**Location:** 55--California Pacific Charter - Los Angeles

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Ch</b>	<b>Account no: 505911781</b>					
	6/30/2023	KRIS001--Kristi Dodson	101370987	8.01	Working Lunch for DC Meeting - DODSON, KRISTI	55--California Pacific Charter - Los Angeles
	6/30/2023	KAJE000--Kajeet, Inc	20137001854	763.44	Student internet plans/hot spots	55--California Pacific Charter - Los Angeles
	6/30/2023	WILL000--William J Howard Jr.	20137001859	100.43	Mileage 6/13 & 6/20 Board Meeting	55--California Pacific Charter - Los Angeles
	6/30/2023	KAJE000--Kajeet, Inc	20137001855	78.03	Student internet plans/hot spots	55--California Pacific Charter - Los Angeles
	6/30/2023	AMAZ000--Amazon	20137001856	118.29	Tech purchase for G Chamberlain	55--California Pacific Charter - Los Angeles
	6/30/2023	TYLE001--Tyler Phipps	20137001860	58.21	Mileage to CalPac Graduation Phipps, Tyler	55--California Pacific Charter - Los Angeles
	6/30/2023	AMAZ000--Amazon	20137001863	107.74	Tech Supplies Ari Tavakoulnia	55--California Pacific Charter - Los Angeles
	6/30/2023	DEBI001--Debi Huber	20137001861	49.00	MILEAGE CAL PAC GRADUATION HUBER, DEBI	55--California Pacific Charter - Los Angeles
		DEBI001--Debi Huber	20137001861	4.31	DC MEETING LUNCH HUBER, DEBI	55--California Pacific Charter - Los Angeles
	6/30/2023	ARIT001--Ari Tavakoulnia	20137001862	23.58	Mileage CalPac Graduation - Tavakoulnia, Arezou	55--California Pacific Charter - Los Angeles
	6/30/2023	PJNU001--PJ Nuzman	20137001857	19.09	Mileage for Graduation and office visit	55--California Pacific Charter - Los Angeles
	6/30/2023	JASO000--Jason D. McFaul	20137001858	11.92	Mileage 6/13 & 6/20 Board Meeting	55--California Pacific Charter - Los Angeles
	6/30/2023	REBE001--Rebecca Ockey	20137001853	19.85	Medieval Times Field Trip	55--California Pacific Charter - Los Angeles
<b>Total for CHASE 1781</b>				<b>81,562.86</b>		

**Company name:** California Pacific Charter - San Diego  
**Report name:** Check register  
**Created on:** 7/3/2023  
**Location:** 44--California Pacific Charter - San Diego

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
CHASE 1781 - Cha	<b>Account no: 505911781</b>					
	6/1/2023	PITN000--Pitney Bowes Global Financi	20137001767	16.53	Postage Machine lease - June 8 - 30 2023	44--California Pacific Charter - San Diego
		PITN000--Pitney Bowes Global Financi	20137001767	49.61	Postage Machine lease - July 1 - Sept 8 2023	44--California Pacific Charter - San Diego
	6/1/2023	AMAZ000--Amazon	20137001774	33.23	Office supplies for shipping	44--California Pacific Charter - San Diego
	6/1/2023	HATC000--Hatch & Cesario, Attorneys	20137001772	32.04	Legal Services for April 2023	44--California Pacific Charter - San Diego
	6/1/2023	EECS000--Effectual Educational Consu	20137001770	65.00	Speech & Lanquage Services April 2023	44--California Pacific Charter - San Diego
	6/1/2023	AMAZ000--Amazon	20137001775	20.12	Mini printer for field trip	44--California Pacific Charter - San Diego
	6/1/2023	AMAZ000--Amazon	20137001776	8.96	Cable chargers for office	44--California Pacific Charter - San Diego
	6/5/2023	DELA000--De Laqe Landen Financial S	101370962	115.20	Copier Lease for June 2023	44--California Pacific Charter - San Diego
	6/5/2023	MAVE001--Maverick Label	101370966	85.57	Asset tags for equipment	44--California Pacific Charter - San Diego
	6/5/2023	JENN005--Jennifer Davis	101370963	29.51	SPED In-Person Workshop (March 2023) - Mileage	44--California Pacific Charter - San Diego
	6/5/2023	CEAN001--Cean Colcord	101370965	27.54	SPED In-Person Workshop (March 2023) - Mileage	44--California Pacific Charter - San Diego
	6/5/2023	APLU000--APLUS+	20137001777	3,253.57	Membership for 2023-24 school year	44--California Pacific Charter - San Diego
	6/5/2023	METL001--MetLife Small Business Cen	20137001778	5,839.91	June Insurance Payment	44--California Pacific Charter - San Diego
	6/5/2023	CHAR001--Charter Impact	101370961	834.25	Payroll Services May 2023	44--California Pacific Charter - San Diego
	6/6/2023	ARNE001--A&R Parcel Three	1571785312TC	1,749.92	June 2023 Rent	44--California Pacific Charter - San Diego
	6/6/2023	MICH001--Michelle Ignacio	20137001783	87.59	TPT Resources for Classroom	44--California Pacific Charter - San Diego
	6/6/2023	JILLT001--Jill Tanner	20137001782	29.95	Mileage Classified Staff Luncheon	44--California Pacific Charter - San Diego
	6/6/2023	MICH001--Michelle Ignacio	20137001781	28.41	SPED In-Person Workshop (March 2023) - Mileage	44--California Pacific Charter - San Diego
	6/6/2023	HEAT001--Heather Goldbach	20137001780	20.15	SPED In-Person Workshop (March 2023) - Mileage	44--California Pacific Charter - San Diego
	6/7/2023	WORL000--Worldwide Express	101370970	170.93	Shipping for CPC-SD	44--California Pacific Charter - San Diego
	6/7/2023	ALPH000--Alpha Vision, Inc.	101370969	126.47	June 2023- CalPac Datto Monthly Backupify G - Suite Cloud to Cloud Email and Dr	44--California Pacific Charter - San Diego
	6/7/2023	CALI003--CaliforniaChoice	101370968	22,317.39	July 2023 Medical Premiums	44--California Pacific Charter - San Diego
	6/7/2023	HOLI002--Holiday Inn Diamond Bar	101370967	132.64	Facility rental for board meeting on 6/20	44--California Pacific Charter - San Diego
	6/8/2023	CLIF000--Clifton Larson Allen LLP	20137001789	1,226.34	Prograss billing for audit services through June 30, 2023	44--California Pacific Charter - San Diego
	6/8/2023	PHIL000--Philadelphia Insurance Com,	20137001788	1.33	22/23 True-Up	44--California Pacific Charter - San Diego
	6/8/2023	ERIC001--Ericka Zemmer	20137001787	23.78	SPED In-Person Workshop (March 2023) - Dinner America's Symposium Mileage Office Visit Mileage	44--California Pacific Charter - San Diego
		ERIC001--Ericka Zemmer	20137001787	24.48		
		ERIC001--Ericka Zemmer	20137001787	31.92		
		ERIC001--Ericka Zemmer	20137001787	20.11		
	6/8/2023	KMED001--KM Educational Consulting	20137001785	325.35	Professional Services for May	44--California Pacific Charter - San Diego
	6/8/2023	ERIC001--Ericka Zemmer	20137001786	184.55	Post Park Staff Meeting Lunch Park Day Mileage	44--California Pacific Charter - San Diego
		ERIC001--Ericka Zemmer	20137001786	6.62		
6/9/2023	ZOOM000--Zoom	20137001790	166.85	Zoom Storage of 5TB Difference	44--California Pacific Charter - San Diego	
6/13/2023	APPL001--Apple, Inc.		2,234.82	Purchase of Mac for Nancy McKenna	44--California Pacific Charter - San Diego	
6/13/2023	AMAZ000--Amazon	20137001803	3,501.50	Tech purchases for Staff	44--California Pacific Charter - San Diego	

**Company name:** California Pacific Charter - San Diego  
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Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
CHASE 1781 - Cha	<b>Account no: 505911781</b>					
	6/13/2023	RING000--RingCentral	20137001795	1,086.01	Monthly phone bill - May 2023	44--California Pacific Charter - San Diego
	6/13/2023	STAP001--Staples Technology Solutio	20137001794	1,400.64	Dell Docking Station for Staff Tech Needs	44--California Pacific Charter - San Diego
	6/13/2023	AMAZ000--Amazon	20137001802	1,246.23	Dell D3100 Docking Station for Staff	44--California Pacific Charter - San Diego
	6/13/2023	TSWT000--TSW Therapy, Inc.	20137001798	1,134.38	OT Services May 2023	44--California Pacific Charter - San Diego
	6/13/2023	KATI002--Katie Hawck	20137001799	59.45	Hyatt Hotel Stay	44--California Pacific Charter - San Diego
		KATI002--Katie Hawck	20137001799	32.77	Gas for Rented Car	44--California Pacific Charter - San Diego
		KATI002--Katie Hawck	20137001799	34.80	Meals during trip	44--California Pacific Charter - San Diego
		KATI002--Katie Hawck	20137001799	163.64	Avis Car Rental	44--California Pacific Charter - San Diego
		KATI002--Katie Hawck	20137001799	34.52	Uber/Lyft Rides	44--California Pacific Charter - San Diego
	6/13/2023	DANI001--Danielle Carbonetta	20137001793	11.18	Baqels for Morning Meeting	44--California Pacific Charter - San Diego
		DANI001--Danielle Carbonetta	20137001793	4.84	America's Best Symposium - Dinner	44--California Pacific Charter - San Diego
		DANI001--Danielle Carbonetta	20137001793	49.75	Mileage for Various Occasions	44--California Pacific Charter - San Diego
	6/13/2023	IRON000--Iron Mountain	20137001796	58.92	May 2023 Storage	44--California Pacific Charter - San Diego
	6/13/2023	STAP001--Staples Technology Solutio	20137001792	148.68	Dell Docking Station for D Carlos	44--California Pacific Charter - San Diego
	6/13/2023	SHAN000--Shannon Green	20137001800	9.99	Mileage to SMF Airport	44--California Pacific Charter - San Diego
		SHAN000--Shannon Green	20137001800	19.29	Lyft from Airport - Office Meeting	44--California Pacific Charter - San Diego
		SHAN000--Shannon Green	20137001800	6.00	SMF Airport Parking - Office Meeting	44--California Pacific Charter - San Diego
	6/13/2023	AMAZ000--Amazon	20137001801	32.88	Office supplies for filming interviews	44--California Pacific Charter - San Diego
	6/13/2023	TYLE001--Tyler Phipps	20137001791	28.64	CTE Field Trip - Disneyland	44--California Pacific Charter - San Diego
	6/13/2023	AMAZ000--Amazon	20137001804	12.62	Office supplies	44--California Pacific Charter - San Diego
	6/14/2023	JENN003--Jenny Chung	101370978	149.34	Mileage	44--California Pacific Charter - San Diego
		JENN003--Jenny Chung	101370978	19.50	Breakfast for Staff	44--California Pacific Charter - San Diego
	6/14/2023	ALLS001--All Systems Go!	101370974	777.51	Marketing for May 2023	44--California Pacific Charter - San Diego
	6/14/2023	PART000--Partners in Special Educatio	101370976	492.50	OT SERVICES APRIL 2023	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001836	479.07	Tech purchase for Corrie Amador	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001831	272.08	Tech purchase for Donald McLeish	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001828	269.68	Tech purchase for Kathrine Johnson	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001838	239.60	Tech purchase for Jennifer Davis	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001829	239.35	Tech needs for Michehl Garcia	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001830	193.93	Tech Needs for Rebecca Ockey	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001834	182.45	Tech purchase for Lauren Curtis	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001832	137.85	Tech purchase for Lisa Martinez	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001821	137.85	Tech needs for Alyssa Ginn	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001823	137.85	Tech purchase for Jill Stubbs	44--California Pacific Charter - San Diego
6/15/2023	AMAZ000--Amazon	20137001822	135.44	Tech needs for Megan Machado	44--California Pacific Charter - San Diego	
6/15/2023	AMAZ000--Amazon	20137001824	134.84	Tech needs for Kathryn Sutton	44--California Pacific Charter - San Diego	
6/15/2023	AMAZ000--Amazon	20137001827	128.93	Tech purchases for Elizabeth Palermo	44--California Pacific Charter - San Diego	
6/15/2023	AMAZ000--Amazon	20137001826	105.60	Tech needs for Cean Colcord	44--California Pacific Charter - San Diego	

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<b>CHASE 1781 - Cha</b>	<b>Account no: 505911781</b>					
	6/15/2023	AMAZ000--Amazon	20137001825	105.60	Tech needs for Marla Malfavon	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001819	26.77	Office Supplies	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001837	78.22	Tech purchase for Debi Huber	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001833	23.16	Tech requests for Laua Hopkins	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001820	2.51	Keychains for Office Keys	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001835	6.53	Tech purchase for Leslee Bayer	44--California Pacific Charter - San Diego
	6/15/2023	BOAR001--BoardOnTrack, Inc.	20137001816	1,598.40	Board on Track Renewal 23-24	44--California Pacific Charter - San Diego
	6/15/2023	PATR001--Patrice Aquilar	20137001817	17.42	Temecula Park Day Mileage	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001811	269.68	Tech Needs for Alice Pak	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001815	224.15	Tech purchase for Victor Noqueda	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001813	157.08	Tech Needs for Debi Huber	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001814	128.55	Tech needs for Jon Winn	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001812	4.92	Office supplies	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001808	240.44	Tech needs for Caryn Masters	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001810	136.04	Tech needs for Shelby Sullivan	44--California Pacific Charter - San Diego
	6/15/2023	AMAZ000--Amazon	20137001807	80.41	Tech purchase for Lisa Martinez	44--California Pacific Charter - San Diego
	6/15/2023	WILL000--William J Howard Jr.	20137001805	50.22	Board Meeting Mileage - May 9	44--California Pacific Charter - San Diego
	6/15/2023	JASO000--Jason D. McFaul	20137001806	5.96	Board Meeting Mileage - May 9	44--California Pacific Charter - San Diego
	6/20/2023	YMCL000--Law Offices of Young, Minn.	101370981	700.27	Legal Services for May 2023	44--California Pacific Charter - San Diego
	6/20/2023	BASS001--Wendell M. Bass Jr.	101370982	216.90	Equity Professional Development June 2023	44--California Pacific Charter - San Diego
	6/20/2023	WORL000--Worldwide Express	101370980	124.84	Shipping for CPC-SD	44--California Pacific Charter - San Diego
	6/20/2023	WORL000--Worldwide Express	101370979	54.11	Shipping for CPC-SD	44--California Pacific Charter - San Diego
	6/20/2023	ECCI000--ECC Imaging LLC.	101370983	4.65	05/11/23 to 06/10/23 coverage period	44--California Pacific Charter - San Diego
	6/21/2023	HATC000--Hatch & Cesario, Attorneys	20137001839	405.78	Legal Services for Feb	44--California Pacific Charter - San Diego
	6/21/2023	BUCH001--Buchalter	20137001841	138.99	Legal Services for April	44--California Pacific Charter - San Diego
	6/21/2023	BUCH001--Buchalter	20137001840	102.82	Legal Services for March	44--California Pacific Charter - San Diego
	6/22/2023	JASO000--Jason D. McFaul	1019769663	200.00	June 2023 Board Stipends - JM	44--California Pacific Charter - San Diego
	6/22/2023	WILL000--William J Howard Jr.	1019769664	200.00	June 2023 Board Stipends - WH	44--California Pacific Charter - San Diego
	6/22/2023	TANY001--Tanya Roqers	1019769669	200.00	June 2023 Board Stipends - TR	44--California Pacific Charter - San Diego
	6/22/2023	KELL000--Kelly Wylie	1019769666	200.00	June 2023 Board Stipends - KW	44--California Pacific Charter - San Diego
	6/22/2023	SHIR000--Shirley Peterson	1019769668	200.00	June 2023 Board Stipends - SP	44--California Pacific Charter - San Diego
	6/23/2023	WORL000--Worldwide Express	101370984	117.02	Shipping for CPC-SD	44--California Pacific Charter - San Diego
	6/23/2023	OXFO000--Oxford Consulting Services	20137001844	1,666.00	EVAL & IEP MAY	44--California Pacific Charter - San Diego



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<b>CHASE 1781 - Cha</b>	<b>Account no: 505911781</b>					
	6/23/2023	PROC000--Procopio, Cory, Hargreaves	20137001842	70.00	Legal Services for May 2023	44--California Pacific Charter - San Diego
	6/26/2023	PROC000--Procopio, Cory, Hargreaves	20137001846	1,778.65	Legal Services for May 2023	44--California Pacific Charter - San Diego
	6/26/2023	PROC000--Procopio, Cory, Hargreaves	20137001845	439.59	Legal Services for May 2023	44--California Pacific Charter - San Diego
	6/26/2023	HATC000--Hatch & Cesario, Attorneys	20137001848	117.46	Legal Services for May 2023	44--California Pacific Charter - San Diego
	6/26/2023	HATC000--Hatch & Cesario, Attorneys	20137001849	224.00	Legal Services for May 2023	44--California Pacific Charter - San Diego
	6/27/2023	ANNI000--Annie Canosa	10255	1,638.00	CANOSA, ANNIE M Salary Expense - Off Salary Schedule	44--California Pacific Charter - San Diego
	6/28/2023	CHAR001--Charter Impact	101370986	834.25	Payroll Services June 2023	44--California Pacific Charter - San Diego
	6/29/2023	OVER000--OverDrive, Inc.	20137001852	1,000.00	SORA library Ebooks and Audiobooks	44--California Pacific Charter - San Diego
	6/29/2023	BUCH001--Buchalter	20137001850	142.96	Legal Services for October 2022	44--California Pacific Charter - San Diego
	6/29/2023	BUCH001--Buchalter	20137001851	54.49	Legal Services for April 2023	44--California Pacific Charter - San Diego
	6/30/2023	PROC000--Procopio, Cory, Hargreaves	20137001873	171.19	Legal Services for June 2023 - Arbitration Fees	44--California Pacific Charter - San Diego
	6/30/2023	ERIC001--Ericka Zemmer	20137001875	29.29	Mileage for Board Meeting 06/13/23	44--California Pacific Charter - San Diego
	6/30/2023	BUCH001--Buchalter	20137001872	24.82	Legal Services for May 2023	44--California Pacific Charter - San Diego
	6/30/2023	VANG000--Vangie Akridge	20137001871	5.64	Mileage to NCUST Conference	44--California Pacific Charter - San Diego
	6/30/2023	MELI001--Melissa Bearup	101370993	86.72	Sped Protocols	44--California Pacific Charter - San Diego
	6/30/2023	MICH001--Michelle Ianacio	20137001865	54.22	TPT Resources for Classroom	44--California Pacific Charter - San Diego
	6/30/2023	CORR001--Corrie Amador	20137001866	43.36	Board Meeting Mileage 6/13/23	44--California Pacific Charter - San Diego
	6/30/2023	ROMY001--Romy Fay-Mason	20137001867	5.76	Toll Roads Reimbursement	44--California Pacific Charter - San Diego
		ROMY001--Romy Fay-Mason	20137001867	29.29	Mileage for Office Visit	44--California Pacific Charter - San Diego
	6/30/2023	ALIC001--Alice Pak	20137001868	13.76	Mileage for Graduation	44--California Pacific Charter - San Diego
	6/30/2023	JANE001--Jane Willson	101370991	12.05	SoCal Grad Mileage	44--California Pacific Charter - San Diego
	6/30/2023	KELL001--Kelly Rocha	101370992	12.05	SoCal Grad Miles	44--California Pacific Charter - San Diego
	6/30/2023	SHEL001--Shelby Sullivan	101370989	46.44	Graduation Mileage	44--California Pacific Charter - San Diego
		SHEL001--Shelby Sullivan	101370989	7.26	Working Lunch Meeting	44--California Pacific Charter - San Diego
		SHEL001--Shelby Sullivan	101370989	1.33	Teachers Pay Teachers Educational Resources for Classroom	44--California Pacific Charter - San Diego
	6/30/2023	ALEX000--Alexis Morfin	101370990	15.59	SoCal Grad Mileage	44--California Pacific Charter - San Diego
	6/30/2023	EECS000--Effectual Educational Consu	20137001864	65.00	SPEECH & LANGUAGE SERVICES MAY 2023	44--California Pacific Charter - San Diego
	6/30/2023	DAIS001--Daisuke Nishikawa	101370988	9.86	MILEAGE CALPAC GRADUATION NISHIKAWA, DAISUKE	44--California Pacific Charter - San Diego
	6/30/2023	KRIS001--Kristi Dodson	101370987	5.33	Working Lunch for DC Meeting - DODSON, KRISTI	44--California Pacific Charter - San Diego
	6/30/2023	KAJE000--Kajeet, Inc	20137001854	506.98	Student internet plans/hot spots	44--California Pacific Charter - San Diego
	6/30/2023	WILL000--William J Howard Jr.	20137001859	100.43	Mileage 6/13 & 6/20 Board Meeting	44--California Pacific Charter - San Diego
	6/30/2023	KAJE000--Kajeet, Inc	20137001855	51.82	Student internet plans/hot spots	44--California Pacific Charter - San Diego
	6/30/2023	TYLE001--Tyler Phipps	20137001860	58.21	Mileage to CalPac Graduation Phipps, Tyler	44--California Pacific Charter - San Diego
	6/30/2023	DEBI001--Debi Huber	20137001861	2.86	DC MEETING LUNCH HUBER, DEBI	44--California Pacific Charter - San Diego

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CHASE 1781 - Cha	<b>Account no: 505911781</b>					
		DEBI001--Debi Huber	20137001861	48.99	MILEAGE CAL PAC GRADUATION HUBER, DEBI	44--California Pacific Charter - San Diego
	6/30/2023	ARIT001--Ari Tavakoulnia	20137001862	23.58	Mileage CalPac Graduation - Tavakoulnia, Arezou	44--California Pacific Charter - San Diego
	6/30/2023	PJNU001--PJ Nuzman	20137001857	12.68	Mileage for Graduation and office visit	44--California Pacific Charter - San Diego
	6/30/2023	JASO000--Jason D. McFaul	20137001858	11.92	Mileage 6/13 & 6/20 Board Meeting	44--California Pacific Charter - San Diego
<b>Total for CHASE 1781</b>				<b>68,074.01</b>		



**Company name:** California Pacific Charter - Sonoma  
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<b>CHASE 1781 - Cha</b>		<b>Account no: 505911781</b>				
	6/1/2023	EECS000--Effectual Educational Consu	20137001769	345.00	Adaptive PE services April 2023	95--California Pacific Charter - Sonoma
	6/1/2023	PITN000--Pitney Bowes Global Financi	20137001767	24.35	Postage Machine lease - July 1 - Sept 8 2023	95--California Pacific Charter - Sonoma
		PITN000--Pitney Bowes Global Financi	20137001767	8.12	Postage Machine lease - June 8 - 30 2023	95--California Pacific Charter - Sonoma
	6/1/2023	AMAZ000--Amazon	20137001774	16.31	Office supplies for shipping	95--California Pacific Charter - Sonoma
	6/1/2023	HATC000--Hatch & Cesario, Attorneys	20137001772	15.72	Legal Services for April 2023	95--California Pacific Charter - Sonoma
	6/1/2023	AMAZ000--Amazon	20137001775	9.88	Mini printer for field trip	95--California Pacific Charter - Sonoma
	6/1/2023	AMAZ000--Amazon	20137001776	4.40	Cable chargers for office	95--California Pacific Charter - Sonoma
	6/5/2023	DELA000--De Laqe Landen Financial S	101370962	56.55	Copier Lease for June 2023	95--California Pacific Charter - Sonoma
	6/5/2023	MAVE001--Maverick Label	101370966	42.01	Asset tags for equipment	95--California Pacific Charter - Sonoma
	6/5/2023	JENN005--Jennifer Davis	101370963	14.48	SPED In-Person Workshop (March 2023) - Mileage	95--California Pacific Charter - Sonoma
	6/5/2023	CEAN001--Cean Colcord	101370965	13.52	SPED In-Person Workshop (March 2023) - Mileage	95--California Pacific Charter - Sonoma
	6/5/2023	APLU000--APLUS+	20137001777	1,597.05	Membership for 2023-24 school year	95--California Pacific Charter - Sonoma
	6/5/2023	VEAL001--Veale Outdoor Advertising	101370960	5,000.00	Advertising for CPC-SO July to August 2023	95--California Pacific Charter - Sonoma
	6/5/2023	CHAR001--Charter Impact	101370961	409.50	Payroll Services May 2023	95--California Pacific Charter - Sonoma
	6/6/2023	ARNE001--A&R Parcel Three	1571785312TC	858.97	June 2023 Rent	95--California Pacific Charter - Sonoma
	6/6/2023	MICH001--Michelle Ignacio	20137001783	43.00	TPT Resources for Classroom	95--California Pacific Charter - Sonoma
	6/6/2023	JILLT001--Jill Tanner	20137001782	14.70	Mileage Classified Staff Luncheon	95--California Pacific Charter - Sonoma
	6/6/2023	MICH001--Michelle Ignacio	20137001781	13.95	SPED In-Person Workshop (March 2023) - Mileage	95--California Pacific Charter - Sonoma
	6/6/2023	HEAT001--Heather Goldbach	20137001780	9.89	SPED In-Person Workshop (March 2023) - Mileage	95--California Pacific Charter - Sonoma
	6/6/2023	UNPL001--Unplug Studio LLC	20137001784	50.00	Hosting and Maintenance CalPacSO - June 2023	95--California Pacific Charter - Sonoma
	6/7/2023	WORL000--Worldwide Express	101370970	209.82	Shipping for CPC-SO	95--California Pacific Charter - Sonoma
	6/7/2023	ALPH000--Alpha Vision, Inc.	101370969	62.08	June 2023- CalPac Datto Monthly Backupify G - Suite Cloud to Cloud Email and Dr	95--California Pacific Charter - Sonoma
	6/7/2023	CALI003--CaliforniaChoice	101370968	10,954.71	July 2023 Medical Premiums	95--California Pacific Charter - Sonoma
	6/7/2023	HOLI002--Holiday Inn Diamond Bar	101370967	65.11	Facility rental for board meeting on 6/20	95--California Pacific Charter - Sonoma
	6/8/2023	CLIF000--Clifton Larson Allen LLP	20137001789	601.97	Progress billing for audit services through June 30, 2023	95--California Pacific Charter - Sonoma

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<b>CHASE 1781 - Cha</b>		<b>Account no: 505911781</b>				
	6/8/2023	PHIL000--Philadelphia Insurance Com	20137001788	0.66	22/23 True-Up	95--California Pacific Charter - Sonoma
	6/8/2023	ERIC001--Ericka Zemmer	20137001787	12.02	America's Symposium Mileage	95--California Pacific Charter - Sonoma
		ERIC001--Ericka Zemmer	20137001787	15.66	Office Visit Mileage	95--California Pacific Charter - Sonoma
		ERIC001--Ericka Zemmer	20137001787	11.67	SPED In-Person Workshop (March 2023) - Dinner	95--California Pacific Charter - Sonoma
		ERIC001--Ericka Zemmer	20137001787	9.87	SPED In-Person Workshop (March 2023) - Mileage	95--California Pacific Charter - Sonoma
	6/8/2023	KMED001--KM Educational Consulting	20137001785	159.71	Professional Services for May	95--California Pacific Charter - Sonoma
	6/9/2023	ZOOM000--Zoom	20137001790	81.90	Zoom Storage of 5TB Difference	95--California Pacific Charter - Sonoma
	6/12/2023	EMHS000--EMH Sports USA, Inc.	101370973	380.00	APE SERVICES MAY 2023	95--California Pacific Charter - Sonoma
	6/13/2023	RING000--RingCentral	20137001795	533.08	Monthly phone bill - May 2023	95--California Pacific Charter - Sonoma
	6/13/2023	KATI002--Katie Hawck	20137001799	29.18	Hyatt Hotel Stay	95--California Pacific Charter - Sonoma
		KATI002--Katie Hawck	20137001799	16.09	Gas for Rented Car	95--California Pacific Charter - Sonoma
		KATI002--Katie Hawck	20137001799	16.95	Uber/Lyft Rides	95--California Pacific Charter - Sonoma
		KATI002--Katie Hawck	20137001799	80.33	Avis Car Rental	95--California Pacific Charter - Sonoma
		KATI002--Katie Hawck	20137001799	17.08	Meals during trip	95--California Pacific Charter - Sonoma
	6/13/2023	DANI001--Danielle Carbonetta	20137001793	24.42	Mileage for Various Occasions	95--California Pacific Charter - Sonoma
		DANI001--Danielle Carbonetta	20137001793	2.38	America's Best Symposium - Dinner	95--California Pacific Charter - Sonoma
		DANI001--Danielle Carbonetta	20137001793	5.49	Baqels for Morning Meeting	95--California Pacific Charter - Sonoma
	6/13/2023	IRON000--Iron Mountain	20137001796	28.92	May 2023 Storage	95--California Pacific Charter - Sonoma
	6/13/2023	SHAN000--Shannon Green	20137001800	4.90	Mileage to SMF Airport	95--California Pacific Charter - Sonoma
		SHAN000--Shannon Green	20137001800	9.47	Lyft from Airport - Office Meeting	95--California Pacific Charter - Sonoma
		SHAN000--Shannon Green	20137001800	2.95	SMF Airport Parking - Office Meeting	95--California Pacific Charter - Sonoma
	6/13/2023	AMAZ000--Amazon	20137001801	16.14	Office supplies for filming interviews	95--California Pacific Charter - Sonoma
	6/13/2023	TYLE001--Tyler Phipps	20137001791	14.05	CTE Field Trip - Disneyland	95--California Pacific Charter - Sonoma
	6/13/2023	AMAZ000--Amazon	20137001804	6.19	Office supplies	95--California Pacific Charter - Sonoma
	6/14/2023	ALLS001--All Systems Go!	101370974	381.64	Marketing for May 2023	95--California Pacific Charter - Sonoma
	6/15/2023	AMAZ000--Amazon	20137001819	13.14	Office Supplies	95--California Pacific Charter - Sonoma
	6/15/2023	AMAZ000--Amazon	20137001818	12.58	Supplies for NorCal Graduation	95--California Pacific Charter - Sonoma
	6/15/2023	AMAZ000--Amazon	20137001820	1.23	Keychains for Office Keys	95--California Pacific Charter - Sonoma
	6/15/2023	BOAR001--BoardOnTrack, Inc.	20137001816	899.10	Board on Track Renewal 23-24	95--California Pacific Charter - Sonoma
	6/15/2023	AMAZ000--Amazon	20137001812	2.41	Office supplies	95--California Pacific Charter - Sonoma
	6/15/2023	AMAZ000--Amazon	20137001809	67.77	Supplies for NorCal Graduation	95--California Pacific Charter - Sonoma
	6/15/2023	WILL000--William J Howard Jr.	20137001805	50.21	Board Meeting Mileage - May 9	95--California Pacific Charter - Sonoma
	6/15/2023	JASO000--Jason D. McFaul	20137001806	5.96	Board Meeting Mileage - May 9	95--California Pacific Charter - Sonoma
	6/20/2023	YMCL000--Law Offices of Young, Minne	101370981	343.73	Legal Services for May 2023	95--California Pacific Charter - Sonoma
	6/20/2023	BASS001--Wendell M. Bass Jr.	101370982	106.47	Equity Professional Development June 2023	95--California Pacific Charter - Sonoma

**Company name:** California Pacific Charter - Sonoma  
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Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Cha</b>		<b>Account no: 505911781</b>				
	6/20/2023	WORL000--Worldwide Express	101370980	45.74	Shipping for CPC-SO	95--California Pacific Charter - Sonoma
	6/20/2023	WORL000--Worldwide Express	101370979	43.96	Shipping for CPC-SO	95--California Pacific Charter - Sonoma
	6/20/2023	ECCI000--ECC Imaging LLC.	101370983	2.29	05/11/23 to 06/10/23 coverage period	95--California Pacific Charter - Sonoma
	6/21/2023	HATC000--Hatch & Cesario, Attorneys	20137001839	199.18	Legal Services for Feb	95--California Pacific Charter - Sonoma
	6/21/2023	BUCH001--Buchalter	20137001841	68.22	Legal Services for April	95--California Pacific Charter - Sonoma
	6/21/2023	BUCH001--Buchalter	20137001840	50.47	Legal Services for March	95--California Pacific Charter - Sonoma
	6/22/2023	JASO000--Jason D. McFaul	1019769663	200.00	June 2023 Board Stipends - JM	95--California Pacific Charter - Sonoma
	6/22/2023	WILL000--William J Howard Jr.	1019769664	200.00	June 2023 Board Stipends - WH	95--California Pacific Charter - Sonoma
	6/22/2023	TANY001--Tanya Rogers	1019769669	200.00	June 2023 Board Stipends - TR	95--California Pacific Charter - Sonoma
	6/22/2023	KELL000--Kelly Wylie	1019769666	200.00	June 2023 Board Stipends - KW	95--California Pacific Charter - Sonoma
	6/22/2023	SHIR000--Shirley Peterson	1019769668	200.00	June 2023 Board Stipends - SP	95--California Pacific Charter - Sonoma
	6/23/2023	INFI001--Infinity Kids	101370985	455.00	PT SERVICES MAY 2023	95--California Pacific Charter - Sonoma
	6/23/2023	WORL000--Worldwide Express	101370984	51.52	Shipping for CPC-SO	95--California Pacific Charter - Sonoma
	6/26/2023	PROC000--Procopio, Cory, Hargreaves	20137001846	873.07	Legal Services for May 2023	95--California Pacific Charter - Sonoma
	6/26/2023	PROC000--Procopio, Cory, Hargreaves	20137001845	215.77	Legal Services for May 2023	95--California Pacific Charter - Sonoma
	6/26/2023	HATC000--Hatch & Cesario, Attorneys	20137001848	57.66	Legal Services for May 2023	95--California Pacific Charter - Sonoma
	6/27/2023	ANNI000--Annie Canosa	10255	364.00	CANOSA, ANNIE M Salary Expense - Off Salary Schedule	95--California Pacific Charter - Sonoma
	6/28/2023	CHAR001--Charter Impact	101370986	409.50	Payroll Services June 2023	95--California Pacific Charter - Sonoma
	6/29/2023	OVER000--OverDrive, Inc.	20137001852	999.34	SORA library Ebooks and Audiobooks	95--California Pacific Charter - Sonoma
	6/29/2023	BUCH001--Buchalter	20137001850	70.17	Legal Services for October 2022	95--California Pacific Charter - Sonoma
	6/29/2023	BUCH001--Buchalter	20137001851	26.75	Legal Services for April 2023	95--California Pacific Charter - Sonoma
	6/30/2023	EECS000--Effectual Educational Consu	20137001869	690.00	ADAPTIVE PE SERVICES MAY 2023	95--California Pacific Charter - Sonoma
	6/30/2023	PROC000--Procopio, Cory, Hargreaves	20137001873	84.03	Legal Services for June 2023 - Arbitration Fees	95--California Pacific Charter - Sonoma
	6/30/2023	ERIC001--Ericka Zemmer	20137001875	14.38	Mileage for Board Meeting 06/13/23	95--California Pacific Charter - Sonoma
	6/30/2023	BUCH001--Buchalter	20137001872	12.18	Legal Services for May 2023	95--California Pacific Charter - Sonoma
	6/30/2023	VANG000--Vanqie Akridaqe	20137001871	2.77	Mileage to NCUST Conference	95--California Pacific Charter - Sonoma
	6/30/2023	MELI001--Melissa Bearup	101370993	42.57	Sped Protocols	95--California Pacific Charter - Sonoma
	6/30/2023	MICH001--Michelle Iqnacio	20137001865	26.62	TPT Resources for Classroom	95--California Pacific Charter - Sonoma
	6/30/2023	CORR001--Corrie Amador	20137001866	21.29	Board Meeting Mileage 6/13/23	95--California Pacific Charter - Sonoma

**Company name:** California Pacific Charter - Sonoma  
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Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Cha</b>	<b>Account no: 505911781</b>					
	6/30/2023	ROMY001--Romy Fay-Mason	20137001867	14.38	Mileage for Office Visit	95--California Pacific Charter - Sonoma
		ROMY001--Romy Fay-Mason	20137001867	2.82	Toll Roads Reimbursement	95--California Pacific Charter - Sonoma
	6/30/2023	SHEL001--Shelby Sullivan	101370989	3.56	Working Lunch Meeting	95--California Pacific Charter - Sonoma
		SHEL001--Shelby Sullivan	101370989	0.66	Teachers Pay Teachers Educational Resources for Classroom	95--California Pacific Charter - Sonoma
	6/30/2023	ALEX000--Alexis Morfin	101370990	31.46	NorCal Grad - Meals	95--California Pacific Charter - Sonoma
		ALEX000--Alexis Morfin	101370990	10.74	NorCal Grad Mileage to Airport	95--California Pacific Charter - Sonoma
	6/30/2023	KRIS001--Kristi Dodson	101370987	2.61	Working Lunch for DC Meeting - DODSON, KRISTI	95--California Pacific Charter - Sonoma
	6/30/2023	KAJE000--Kajeet, Inc	20137001854	248.86	Student internet plans/hot spots	95--California Pacific Charter - Sonoma
	6/30/2023	WILL000--William J Howard Jr.	20137001859	100.44	Mileage 6/13 & 6/20 Board Meeting	95--California Pacific Charter - Sonoma
	6/30/2023	KAJE000--Kajeet, Inc	20137001855	25.43	Student internet plans/hot spots	95--California Pacific Charter - Sonoma
	6/30/2023	DEBI001--Debi Huber	20137001861	1.41	DC MEETING LUNCH HUBER, DEBI	95--California Pacific Charter - Sonoma
	6/30/2023	PJNU001--PJ Nuzman	20137001857	6.22	Mileage for Graduation and office visit	95--California Pacific Charter - Sonoma
	6/30/2023	JASO000--Jason D. McFaul	20137001858	11.92	Mileage 6/13 & 6/20 Board Meeting	95--California Pacific Charter - Sonoma
Total for CHASE 1781				30,091.43		

**Company name:** California Pacific Charter - Los Angeles  
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<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/3/2023	PATX002--Pennsylvania Department of Revenue	1814678469TC	6.42	PA Tax Payments	55--California Pacific Charter - Los Angeles
	7/3/2023	PATX002--Pennsylvania Department of Revenue	1814678471TC	108.49	PA Tax Payments	55--California Pacific Charter - Los Angeles
	7/3/2023	PAYCOM--Paycom - Payroll ACH Withdrawals	101371004	8.54	2023 QT2 Quarterly Form Fee	55--California Pacific Charter - Los Angeles
	7/3/2023	EVER000--Evergreen Educational Group	101370997	2,500.00	Contract for 23/24 SY (DLC - Digital Learning)	55--California Pacific Charter - Los Angeles
	7/3/2023	HANO000--The Hanover Insurance Group	101370998	1,594.00	Fidelity and Crime Policy for 23/24	55--California Pacific Charter - Los Angeles
	7/3/2023	DELA000--De Lage Landen Financial Services Inc.	101371001	172.61	Copier Lease for July 2023	55--California Pacific Charter - Los Angeles
	7/3/2023	WORL000--Worldwide Express	101371000	145.83	Shipping for CPC-LA	55--California Pacific Charter - Los Angeles
	7/3/2023	VICT001--Victor Noqueda	101370999	30.79	Mileage for SoCal Graduation	55--California Pacific Charter - Los Angeles
	7/3/2023	DAIS002--Daisy Carlos	20137001877	22.19	Office Supplies	55--California Pacific Charter - Los Angeles
		DAIS002--Daisy Carlos	20137001877	21.61	Office Meeting - Food	55--California Pacific Charter - Los Angeles
		DAIS002--Daisy Carlos	20137001877	7.78	Beverages for Board	55--California Pacific Charter - Los Angeles
		DAIS002--Daisy Carlos	20137001877	98.54	NCSC Conference Food	55--California Pacific Charter - Los Angeles
		DAIS002--Daisy Carlos	20137001877	63.69	NCSC Conference	55--California Pacific Charter - Los Angeles
		DAIS002--Daisy Carlos	20137001877	12.42	Grad Night - Uber	55--California Pacific Charter - Los Angeles
		DAIS002--Daisy Carlos	20137001877	232.64	NCSC Conference Travel - Flights	55--California Pacific Charter - Los Angeles
		DAIS002--Daisy Carlos	20137001877	68.06	Mileage for Board Meetings	55--California Pacific Charter - Los Angeles
	7/3/2023	DOCU000--Document Tracking Services	101370995	375.00	Document Tracking Services for 2023/2024	55--California Pacific Charter - Los Angeles
	7/3/2023	KATI002--Katie Hawck	20137001878	10.78	Toll Charges for FT in SD	55--California Pacific Charter - Los Angeles
		KATI002--Katie Hawck	20137001878	37.28	Meals for Conferences	55--California Pacific Charter - Los Angeles
		KATI002--Katie Hawck	20137001878	36.15	Lyft Rides for Conference	55--California Pacific Charter - Los Angeles
	7/5/2023	ARNE001--A&R Parcel Three	1869739638TC	2,622.00	July 2023 Rent	55--California Pacific Charter - Los Angeles
	7/5/2023	MICR000--MicroAge	101371014	781.34	Virus Protection for student computers 23-24	55--California Pacific Charter - Los Angeles
		MICR000--MicroAge	101371014	781.34	Virus Protection for student computers 24-25	55--California Pacific Charter - Los Angeles
		MICR000--MicroAge	101371014	781.33	Virus Protection for student computers 25-26	55--California Pacific Charter - Los Angeles
	7/5/2023	NCUST01--National Center for Urban School Transfo	101371013	251.25	NCUST Confernce Registration for D Carbonetta	55--California Pacific Charter - Los Angeles
	7/5/2023	SANJ000--San Joaquin County Office of Education	101371009	975.00	CSC Conference October 2023 registration for 3 staff	55--California Pacific Charter - Los Angeles
	7/5/2023	MYST000--Mystery Science, Inc.	101371008	697.50	Science Curriculum Membership for 2023-2024	55--California Pacific Charter - Los Angeles
	7/5/2023	ESGI001--ESGI, LLC	101371007	183.00	Assessment License for 23/24 SY	55--California Pacific Charter - Los Angeles
	7/5/2023	NCUST01--National Center for Urban School Transfo	101371012	138.19	2023 America's Best Schools Symposium Registration - Vangie Akridge	55--California Pacific Charter - Los Angeles
	7/5/2023	DONA001--Donald McLeish	101371005	40.21	Meals Sped Testing McLeish,	55--California Pacific Charter - Los Angeles

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<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
		DONA001--Donald McLeish	101371005	176.85	Mileage for Sped Testing - McLeish, Donald	55--California Pacific Charter - Los Angeles
	7/5/2023	RING000--RingCentral	20137001889	1,557.94	Monthly phone bill - June 2023	55--California Pacific Charter - Los Angeles
	7/5/2023	STAP001--Staples Technoloav Solutions	20137001888	991.04	LENOVA 500E CB'S LA (4)	55--California Pacific Charter - Los Angeles
	7/5/2023	CHRI001--Christine Feher	20137001891	8.04	Lock - Extra Storage	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	330.04	Airline - NCSC Austin	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	21.11	Parking - NCSC Austin	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	5.14	Mileage - NCSC Austin	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	202.65	Hotel - NCSC Austin	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	25.90	Uber - NCSC Austin	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	66.22	Food - NCSC Austin	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	19.28	Arbitration Lunch	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	42.13	Board Meeting Mileage	55--California Pacific Charter - Los Angeles
		CHRI001--Christine Feher	20137001891	11.73	SoCal Graduation Mileage	55--California Pacific Charter - Los Angeles
	7/5/2023	GRET000--Gretchen Chamberlain	20137001890	28.11	Chamberlain, G Mileage Board Meeting	55--California Pacific Charter - Los Angeles
		GRET000--Gretchen Chamberlain	20137001890	13.54	Postage for Staff	55--California Pacific Charter - Los Angeles
	7/5/2023	BUCH001--Buchalter	20137001892	32.41	Legal services for June 2023	55--California Pacific Charter - Los Angeles
	7/5/2023	AMAZ000--Amazon	20137001887	260.26	Tech purchase for Kristi Dodson	55--California Pacific Charter - Los Angeles
	7/5/2023	AMAZ000--Amazon	20137001886	208.31	Tech purchase for Brittany Lutz	55--California Pacific Charter - Los Angeles
	7/5/2023	AMAZ000--Amazon	20137001885	130.94	Tech purchase for Monica Philips	55--California Pacific Charter - Los Angeles
	7/5/2023	CORW001--Corwin Press, Inc.	20137001884	560.00	Virtual PLC + Activators Guide Institute For 5 Staff	55--California Pacific Charter - Los Angeles
	7/5/2023	VICT000--Victoria Law	20137001880	362.02	Reimbursement for Victoria Law-SPED protocols	55--California Pacific Charter - Los Angeles
	7/5/2023	JILLT001--Jill Tanner	20137001881	107.55	HOTEL FOR BOARD MEETING - TANNER, JILL	55--California Pacific Charter - Los Angeles
		JILLT001--Jill Tanner	20137001881	4.52	SNACK/DRINK FOR BOARD MEETING - TANNER, JILL	55--California Pacific Charter - Los Angeles
		JILLT001--Jill Tanner	20137001881	93.50	MILEAGE/PARKING/TOLLS BOARD MEETING - TANNER, JILL	55--California Pacific Charter - Los Angeles
	7/5/2023	SHAN000--Shannon Green	20137001882	12.06	Parking - In-Person June 2023 Board Meeting	55--California Pacific Charter - Los Angeles
		SHAN000--Shannon Green	20137001882	107.55	Hotel - In-Person June 2023 Board Meeting	55--California Pacific Charter - Los Angeles
		SHAN000--Shannon Green	20137001882	37.29	Meals - In-Person June 2023 Board Meeting	55--California Pacific Charter - Los Angeles
		SHAN000--Shannon Green	20137001882	14.25	Printer Paper	55--California Pacific Charter - Los Angeles
		SHAN000--Shannon Green	20137001882	15.04	Mileage to SMF Airport	55--California Pacific Charter - Los Angeles
	7/5/2023	JILL001--Jill Stubbs	20137001879	34.45	Mileage for Medieval Times Field Trip	55--California Pacific Charter - Los Angeles
	7/6/2023	AMAZ000--Amazon	20137001906	484.86	Tech purchase for Maryel Kindem	55--California Pacific Charter - Los Angeles
	7/6/2023	AMAZ000--Amazon	20137001910	250.64	Tech purchase for Lori Frank	55--California Pacific Charter - Los Angeles



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<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/6/2023	AMAZ000--Amazon	20137001908	143.07	Tech purchases for Leslee Bayer	55--California Pacific Charter - Los Angeles
	7/6/2023	AMAZ000--Amazon	20137001907	134.84	Tech purchase for Michelle Ignacio	55--California Pacific Charter - Los Angeles
	7/6/2023	AMAZ000--Amazon	20137001909	73.89	Tech order for Gretchen Chamberlain	55--California Pacific Charter - Los Angeles
	7/6/2023	DEBI001--Debi Huber	20137001905	12.56	TB Test	55--California Pacific Charter - Los Angeles
		DEBI001--Debi Huber	20137001905	2.08	Mileage for TB Test	55--California Pacific Charter - Los Angeles
		DEBI001--Debi Huber	20137001905	50.69	Mileage for Disneyland Field Trip	55--California Pacific Charter - Los Angeles
	7/6/2023	KAJE000--Kajeet, Inc	20137001903	7,840.39	Contract for 23/24 SY Hotspots	55--California Pacific Charter - Los Angeles
	7/6/2023	GOGU000--GoGuardian	20137001904	7,344.00	Contract for 23/24 SY Educational Technology	55--California Pacific Charter - Los Angeles
	7/6/2023	ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,664.70	Alludo Licenses for 25/26 Professional Development	55--California Pacific Charter - Los Angeles
		ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,664.70	Alludo Licenses for 24/25 Professional Development	55--California Pacific Charter - Los Angeles
		ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,664.70	Alludo Licenses for 23/24 Professional Development	55--California Pacific Charter - Los Angeles
	7/6/2023	PADL001--Padlet	20137001895	750.00	Software for Student Collaboration	55--California Pacific Charter - Los Angeles
	7/6/2023	EDME000--Edmentum	20137001898	615.00	Contract for Reading Eggs License 23/24 SY	55--California Pacific Charter - Los Angeles
	7/6/2023	SEES000--Seesaw Learning, Inc.	20137001902	500.00	Contract for 23/24 SY Online Curriculum	55--California Pacific Charter - Los Angeles
	7/6/2023	ARTI001--Art In Action	20137001896	345.00	Art Curriculum for 23/24 SY	55--California Pacific Charter - Los Angeles
	7/6/2023	3PLE000--3P Learning Inc.	20137001901	300.00	Contract for Mathseeds Subscription 23/24 SY	55--California Pacific Charter - Los Angeles
	7/6/2023	AMAZ000--Amazon	20137001899	240.44	Tech purchase for Rebecca Ockey	55--California Pacific Charter - Los Angeles
	7/6/2023	AMAZ000--Amazon	20137001900	136.04	Tech purchase for Elena Hoffman	55--California Pacific Charter - Los Angeles
	7/7/2023	BERK000--Berkshire Hathaway	1880446621TC	4,055.25	Workers Comp Downpayment for 7/1/23-7/1/24 Policy	55--California Pacific Charter - Los Angeles
	7/7/2023	CASBO01--CASBO	101371015	829.17	CASBO Membership 2025-26	55--California Pacific Charter - Los Angeles
		CASBO01--CASBO	101371015	829.17	CASBO Membership 2023-24	55--California Pacific Charter - Los Angeles
		CASBO01--CASBO	101371015	829.17	CASBO Membership 2024-25	55--California Pacific Charter - Los Angeles
	7/10/2023	CHAR000--Charter Schools Development Center	101371023	1,641.50	California Charter Schools Leadership Conference Nov 2023	55--California Pacific Charter - Los Angeles
	7/10/2023	WORL000--Worldwide Express	101371019	401.93	Shipping for CPC-LA (22/23 SY)	55--California Pacific Charter - Los Angeles
	7/10/2023	ALPH000--Alpha Vision, Inc.	101371022	189.50	July-CalPac Datto Monthly Backupify G - Suite Cloud to Cloud Email	55--California Pacific Charter - Los Angeles
	7/10/2023	ALLS001--All Systems Go!	101371017	1,283.53	Google Ads for July 2023	55--California Pacific Charter - Los Angeles
	7/10/2023	YMCL000--Law Offices of Young, Minney & Corr. LLP	101371018	460.00	Legal Services for June 2023	55--California Pacific Charter - Los Angeles

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<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/11/2023	AMAZ000--Amazon	20137001923	138.65	Tech purchase for Tyler Phipps	55--California Pacific Charter - Los Angeles
	7/11/2023	AMAZ000--Amazon	20137001924	136.04	Tech purchase for Amy Evans	55--California Pacific Charter - Los Angeles
	7/11/2023	AMAZ000--Amazon	20137001922	134.84	Tech purchase for Amy Nquyen	55--California Pacific Charter - Los Angeles
	7/11/2023	AMAZ000--Amazon	20137001925	130.91	Tech purchase for Nancy McKenna	55--California Pacific Charter - Los Angeles
	7/11/2023	AMAZ000--Amazon	20137001921	109.27	Tech purchase for Lori Frank	55--California Pacific Charter - Los Angeles
	7/11/2023	APLU000--APLUS+	20137001920	2,324.18	Aplus+ Conference Registration - Oct 2023	55--California Pacific Charter - Los Angeles
	7/11/2023	PHIL000--Philadelphia Insurance Companies	20137001916	804.00	Participant Accident Coverage 07/01/23-06/30/24	55--California Pacific Charter - Los Angeles
	7/11/2023	DANI001--Danielle Carbonetta	20137001919	32.66	Bagels for Staff Meetings 6/21 & 6/28	55--California Pacific Charter - Los Angeles
	7/11/2023	LISA002--Lisa Mejia Martinez	20137001918	15.00	SoCal Graduation Mileage	55--California Pacific Charter - Los Angeles
	7/11/2023	CCSA001--California Charter Schools Association	20137001915	5,265.00	Membership for the 23/24 SY	55--California Pacific Charter - Los Angeles
	7/11/2023	PROC000--Procopio, Corv, Harareaves & Savitch LLI	20137001914	1,319.06	Legal Services for April 2023	55--California Pacific Charter - Los Angeles
	7/11/2023	BUCH001--Buchalter	20137001913	32.41	Legal Services for March 2023	55--California Pacific Charter - Los Angeles
	7/11/2023	SEAS001--Carly Stone (Sea Stone Productions)	20137001912	1,005.00	Post-production Invoice for CalPac Park Day Video Project	55--California Pacific Charter - Los Angeles
	7/11/2023	PROC000--Procopio, Cory, Harqreaves & Savitch LLI	20137001911	1,400.00	Legal Services for July 2023	55--California Pacific Charter - Los Angeles
	7/13/2023	PAYCOM--Paycom - Payroll ACH Withdrawals	101371026	114.00	0BL91 Paycom Access - July 2023	55--California Pacific Charter - Los Angeles
	7/13/2023	JENN001--Jennifer Byus	101371024	8.56	Office Meeting Mileage 4/21/23	55--California Pacific Charter - Los Angeles
	7/14/2023	KELL001--Kelly Rocha	Voided - 101370	-8.49	Rocha, Kelly - School Pathways Mileage	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001946	108.74	Tech purchase for Frances Acin	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001947	107.74	Tech purchase for Nancy McKenna	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001938	108.74	Tech purchase for Elena Hoffman	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001937	233.50	Tech purchase for Carrie Jamil	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001934	134.84	Tech request for Elizabeth	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001933	134.84	Tech purchases for Ari Tavakoulunia	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001945	109.49	Tech Purchase for Jenny Chung	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001940	109.49	Tech purchase for Gretchen Chamberlain	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001944	108.74	Tech Purchase for Amy Evans	55--California Pacific Charter - Los Angeles



**Company name:** California Pacific Charter - Los Angeles  
**Report name:** Check register  
**Created on:** 8/2/2023  
**Location:** 55--California Pacific Charter - Los Angeles

Bank	Date	Vendor Account no: 505911781	Document no.	Amount applied	Memo	Location
CHASE 1781 - Chase Bank - Main	7/14/2023	AMAZ000--Amazon	20137001943	108.74	Tech Purchase for Tyler Phipps	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001942	107.74	Tech purchase for Amy Nquyen	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001941	107.74	Tech Purchase for Elizabeth DelConte	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001939	107.74	Tech purchase for Lori Frank	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001936	79.31	Tech purchase for Acin Frances	55--California Pacific Charter - Los Angeles
	7/14/2023	AMAZ000--Amazon	20137001935	78.95	Tech purchase for Holly Hess	55--California Pacific Charter - Los Angeles
	7/14/2023	RENA001--Renaissance Learning, Inc.	20137001928	12,988.75	Curriculum for 23/24	55--California Pacific Charter - Los Angeles
	7/14/2023	NORE001--NoRedInk	20137001930	4,775.00	Subscription for 23/24 SY Online Curriculum	55--California Pacific Charter - Los Angeles
	7/14/2023	NEAR001--Nearpod Inc.	20137001932	4,300.00	Contract for 23/24 SY Online Curriculum	55--California Pacific Charter - Los Angeles
	7/14/2023	CLIF000--Clifton Larson Allen LLP	20137001929	844.20	Progress billing for audit services through June 30, 2023	55--California Pacific Charter - Los Angeles
	7/14/2023	IRON000--Iron Mountain	20137001931	234.36	June 2023 Services	55--California Pacific Charter - Los Angeles
	7/17/2023	KELL001--Kelly Rocha	20137001948	8.49	Rocha, Kelly - School Pathways Mileage	55--California Pacific Charter - Los Angeles
	7/18/2023	HATC000--Hatch & Cesario, Attorneys-at-Law	20137001949	3,609.50	Legal Services for June 2023	55--California Pacific Charter - Los Angeles
	7/20/2023	ZOOM000--Zoom	20137001950	251.25	Zoom 500 TB Storage Fee - June 2023	55--California Pacific Charter - Los Angeles
	7/24/2023	JASO000--Jason D. McFaul	1022471811	200.00	July 2023 Board Stipends - JM	55--California Pacific Charter - Los Angeles
	7/24/2023	WILL000--William J Howard Jr.	1022471809	200.00	July 2023 Board Stipends - WH	55--California Pacific Charter - Los Angeles
	7/24/2023	TANY001--Tanva Roqers	1022471813	200.00	July 2023 Board Stipends - TR	55--California Pacific Charter - Los Angeles
	7/24/2023	KELL000--Kelly Wylie	1022471810	200.00	July 2023 Board Stipends - KW	55--California Pacific Charter - Los Angeles
	7/24/2023	SHIR000--Shirley Peterson	1022471812	200.00	July 2023 Board Stipends - SP	55--California Pacific Charter - Los Angeles
	7/24/2023	WORL000--Worldwide Express	101371028	153.56	22/23 Shipping for CPC-LA	55--California Pacific Charter - Los Angeles
		WORL000--Worldwide Express	101371028	13.66	23/24 Shipping for CPC-LA	55--California Pacific Charter - Los Angeles
	7/24/2023	AMAZ000--Amazon	20137001952	53.52	Office supplies	55--California Pacific Charter - Los Angeles
	7/24/2023	AMAZ000--Amazon	20137001951	5.39	Office supplies	55--California Pacific Charter - Los Angeles
	7/25/2023	UKG0001--UKG	20137001965	2,000.00	Workforce Ready Payroll - Full year of payroll history	55--California Pacific Charter - Los Angeles
	7/25/2023	TURN000--Turnitin LLC	20137001966	1,847.50	Contract for 23/24 SY	55--California Pacific Charter - Los Angeles
	7/25/2023	KMED001--KM Educational Consulting and Executive	20137001967	75.38	Professional Services - June 2023	55--California Pacific Charter - Los Angeles

**Company name:** California Pacific Charter - Los Angeles  
**Report name:** Check register  
**Created on:** 8/2/2023  
**Location:** 55--California Pacific Charter - Los Angeles

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/25/2023	SCHO000--School Pathways, LLC	20137001958	1,206.73	Subscriptions True Ups Jul 22 - June 23	55--California Pacific Charter - Los Angeles
	7/25/2023	OXFO000--Oxford Consulting Services, Inc.	20137001960	687.50	June 2023 Services	55--California Pacific Charter - Los Angeles
	7/25/2023	AMAZ000--Amazon	20137001962	108.74	Tech Supplies Heather Goldbach	55--California Pacific Charter - Los Angeles
	7/25/2023	AMAZ000--Amazon	20137001963	108.24	Tech purchase for Holly Hess	55--California Pacific Charter - Los Angeles
	7/25/2023	AMAZ000--Amazon	20137001956	107.74	Tech Supplies Michelle Ignacio	55--California Pacific Charter - Los Angeles
	7/25/2023	AMAZ000--Amazon	20137001957	107.74	Tech purchase for Jennifer Byus	55--California Pacific Charter - Los Angeles
	7/25/2023	AMAZ000--Amazon	20137001955	107.74	Tech Supplies Rebecca Ockey	55--California Pacific Charter - Los Angeles
	7/25/2023	AMAZ000--Amazon	20137001964	43.31	Office Supplies	55--California Pacific Charter - Los Angeles
	7/25/2023	AMAZ000--Amazon	20137001959	21.63	Office supplies- foot rest for J. Willson	55--California Pacific Charter - Los Angeles
	7/25/2023	AMAZ000--Amazon	20137001961	5.50	Keyboard Cover Skin Compatible with Logitech Ergo K860 - Gretchen Chamberlain	55--California Pacific Charter - Los Angeles
	7/27/2023	PATH001--Pathful	20137001969	5,750.00	Licenses for CTE 23/24 SY	55--California Pacific Charter - Los Angeles
	7/27/2023	STAP001--Staples Technology Solutions	20137001968	320.00	GOOGLE CHROME OS MANAGEMENT for Students	55--California Pacific Charter - Los Angeles
	7/27/2023	SCHO000--School Pathways, LLC	20137001971	290.00	Annual Subscription for the 23/24 SY for CPC-LA	55--California Pacific Charter - Los Angeles
	7/28/2023	WORL000--Worldwide Express	101371032	70.79	22/23 Shipping for CPC-LA	55--California Pacific Charter - Los Angeles
		WORL000--Worldwide Express	101371032	26.89	23/24 Shipping for CPC-LA	55--California Pacific Charter - Los Angeles
	7/28/2023	ECCI000--ECC Imaging LLC.	101371031	6.98	6/11/2023 to 7/10/2023 coverage period	55--California Pacific Charter - Los Angeles
	7/28/2023	SCHO000--School Pathways, LLC	20137001982	22,439.52	Annual Subscription for the 23/24 SY for CPC-LA	55--California Pacific Charter - Los Angeles
	7/28/2023	CTL000--CTL Corporation	20137001980	1,350.00	Google Workspace for EDU Std for LA Students	55--California Pacific Charter - Los Angeles
	7/28/2023	AMAZ000--Amazon	20137001973	270.61	Tech Supplies Victor Noqueda	55--California Pacific Charter - Los Angeles
	7/28/2023	AMAZ000--Amazon	20137001974	215.22	Tech Supplies Joy Nehr	55--California Pacific Charter - Los Angeles
	7/28/2023	AMAZ000--Amazon	20137001975	109.74	Tech Supplies Carly Berry	55--California Pacific Charter - Los Angeles
<b>Total for CHASE 1781</b>				<b>136,243.28</b>		

**Company name:** California Pacific Charter - San Diego  
**Report name:** Check register  
**Created on:** 08/02/23  
**Location:** 44--California Pacific Charter - San Diego

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	07/03/23	PATX002--Pennsylvania Department of Revenue	1814678471TC	76.31	PA Tax Payments	44--California Pacific Charter - San Diego
	07/03/23	SDMC001--San Diego Mesa College	101371003	20.00	College fees for Apodaca, Mariah - Spring 2023	44--California Pacific Charter - San Diego
	07/03/23	PAYCOM--Paycom - Payroll ACH Withdrawals	101371004	5.68	2023 QT2 Quarterly Form Fee	44--California Pacific Charter - San Diego
	07/03/23	EVER000--Evergreen Educational Group	101370997	1,600.00	Contract for 23/24 SY (DLC - Digital Learning)	44--California Pacific Charter - San Diego
	07/03/23	HANO000--The Hanover Insurance Group	101370998	1,020.16	Fidelity and Crime Policy for 23/24	44--California Pacific Charter - San Diego
	07/03/23	DELA000--De Lage Landen Financial Services Inc.	101371001	110.47	Copier Lease for July 2023	44--California Pacific Charter - San Diego
	07/03/23	WORL000--Worldwide Express	101371000	95.11	Shipping for CPC-SD	44--California Pacific Charter - San Diego
	07/03/23	VICT001--Victor Noguera	101370999	30.78	Mileage for SoCal Graduation	44--California Pacific Charter - San Diego
	07/03/23	SDMC002--San Diego Miramar College	101371002	22.00	Health & ASB College & Career Readiness	44--California Pacific Charter - San Diego
	07/03/23	DAIS002--Daisy Carlos	20137001877	5.17	Beverages for Board	44--California Pacific Charter - San Diego
		DAIS002--Daisy Carlos	20137001877	65.43	NCSC Conference Food	44--California Pacific Charter - San Diego
		DAIS002--Daisy Carlos	20137001877	42.30	NCSC Conference	44--California Pacific Charter - San Diego
		DAIS002--Daisy Carlos	20137001877	154.49	NCSC Conference Travel - Flights	44--California Pacific Charter - San Diego
		DAIS002--Daisy Carlos	20137001877	14.73	Office Supplies	44--California Pacific Charter - San Diego
		DAIS002--Daisy Carlos	20137001877	14.35	Office Meeting - Food	44--California Pacific Charter - San Diego
		DAIS002--Daisy Carlos	20137001877	8.24	Grad Night - Uber	44--California Pacific Charter - San Diego
		DAIS002--Daisy Carlos	20137001877	45.20	Mileage for Board Meetings	44--California Pacific Charter - San Diego
	07/03/23	DOCU000--Document Tracking Services	101370995	240.00	Document Tracking Services for 2023/2024	44--California Pacific Charter - San Diego
	07/03/23	KATI002--Katie Hawck	20137001878	24.75	Meals for Conferences	44--California Pacific Charter - San Diego
		KATI002--Katie Hawck	20137001878	24.01	Lyft Rides for Conference	44--California Pacific Charter - San Diego
		KATI002--Katie Hawck	20137001878	7.16	Toll Charges for FT in SD	44--California Pacific Charter - San Diego
	07/05/23	ARNE001--A&R Parcel Three	1869739638TC	1,678.08	July 2023 Rent	44--California Pacific Charter - San Diego
	07/05/23	MICR000--MicroAge	101371014	500.05	Virus Protection for student computers 23-24	44--California Pacific Charter - San Diego
		MICR000--MicroAge	101371014	500.05	Virus Protection for student computers 24-25	44--California Pacific Charter - San Diego
		MICR000--MicroAge	101371014	500.05	Virus Protection for student computers 25-26	44--California Pacific Charter - San Diego
	07/05/23	NCUST01--National Center for Urban School Transf	101371013	166.85	NCUST Conference Registration for D Carbonetta	44--California Pacific Charter - San Diego
	07/05/23	SDMC001--San Diego Mesa College	101371010	17.00	College Health fee for Cohen,Evehett - Summer 2023	44--California Pacific Charter - San Diego
	07/05/23	SANJ000--San Joaquin County Office of Education	101371009	624.00	CSC Conference October 2023 registration for 3 staff	44--California Pacific Charter - San Diego
	07/05/23	MYST000--Mystery Science, Inc.	101371008	446.40	Science Curriculum Membership for 2023-2024	44--California Pacific Charter - San Diego
	07/05/23	ESGI001--ESGI, LLC	101371007	117.12	Assessment License for 23/24 SY	44--California Pacific Charter - San Diego
	07/05/23	NCUST01--National Center for Urban School Transf	101371012	91.76	2023 America's Best Schools Symposium Registration - Vanqie Akridqe	44--California Pacific Charter - San Diego

**Company name:** California Pacific Charter - San Diego  
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<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	07/05/23	DONA001--Donald McLeish	101371005	26.69	Meals Sped Testinq McLeish, Donald	44--California Pacific Charter - San Diego
	07/05/23	RING000--RingCentral	20137001889	1,034.59	Monthly phone bill - June 2023	44--California Pacific Charter - San Diego
	07/05/23	STAP001--Staples Technology Solutions	20137001888	743.28	LENOVA 500E CB'S SD (3)	44--California Pacific Charter - San Diego
	07/05/23	CHRI001--Christine Feher	20137001891	27.98	Board Meeting Mileage	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	11.72	SoCal Graduation Mileage	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	5.34	Lock - Extra Storage	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	134.57	Hotel - NCSC Austin	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	17.21	Uber - NCSC Austin	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	219.17	Airline - NCSC Austin	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	43.98	Food - NCSC Austin	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	12.80	Arbitration Lunch	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	14.01	Parking - NCSC Austin	44--California Pacific Charter - San Diego
		CHRI001--Christine Feher	20137001891	3.41	Mileage - NCSC Austin	44--California Pacific Charter - San Diego
	07/05/23	GRET000--Gretchen Chamberlain	20137001890	8.99	Postage for Staff	44--California Pacific Charter - San Diego
		GRET000--Gretchen Chamberlain	20137001890	18.67	Chamberlain, G Mileage Board Meeting	44--California Pacific Charter - San Diego
	07/05/23	BUCH001--Buchalter	20137001892	21.52	Legal services for June 2023	44--California Pacific Charter - San Diego
	07/05/23	CORW001--Corwin Press, Inc.	20137001884	358.40	Virtual PLC + Activators Guide Institute For 5 Staff	44--California Pacific Charter - San Diego
	07/05/23	VICT000--Victoria Law	20137001880	240.41	Reimbursement for Victoria Law- SPED protocols	44--California Pacific Charter - San Diego
	07/05/23	JILLT001--Jill Tanner	20137001881	62.08	MILEAGE/PARKING/TOLLS BOARD MEETING - TANNER, JILL	44--California Pacific Charter - San Diego
		JILLT001--Jill Tanner	20137001881	3.01	SNACK/DRINK FOR BOARD MEETING - TANNER, JILL	44--California Pacific Charter - San Diego
		JILLT001--Jill Tanner	20137001881	71.41	HOTEL FOR BOARD MEETING - TANNER, JILL	44--California Pacific Charter - San Diego
	07/05/23	SHAN000--Shannon Green	20137001882	24.76	Meals - In-Person June 2023 Board Meeting	44--California Pacific Charter - San Diego
		SHAN000--Shannon Green	20137001882	8.01	Parking - In-Person June 2023 Board Meeting	44--California Pacific Charter - San Diego
		SHAN000--Shannon Green	20137001882	9.99	Mileage to SMF Airport	44--California Pacific Charter - San Diego
		SHAN000--Shannon Green	20137001882	71.41	Hotel - In-Person June 2023 Board Meeting	44--California Pacific Charter - San Diego
		SHAN000--Shannon Green	20137001882	9.46	Printer Paper	44--California Pacific Charter - San Diego
	07/06/23	DEBI001--Debi Huber	20137001905	33.66	Mileage for Disneyland Field Trip	44--California Pacific Charter - San Diego
		DEBI001--Debi Huber	20137001905	8.34	TB Test	44--California Pacific Charter - San Diego
		DEBI001--Debi Huber	20137001905	1.37	Mileage for TB Test	44--California Pacific Charter - San Diego
	07/06/23	KAJE000--Kajeet, Inc	20137001903	5,017.85	Contract for 23/24 SY Hotspots	44--California Pacific Charter - San Diego
	07/06/23	GOGU000--GoGuardian	20137001904	4,700.16	Contract for 23/24 SY Educational Technology	44--California Pacific Charter - San Diego
	07/06/23	ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,663.90	Alludo Licenses for 23/24 Professional Development	44--California Pacific Charter - San Diego
		ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,663.90	Alludo Licenses for 25/26 Professional Development	44--California Pacific Charter - San Diego
		ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,663.90	Alludo Licenses for 24/25 Professional Development	44--California Pacific Charter - San Diego
	07/06/23	PADL001--Padlet	20137001895	480.00	Software for Student Collaboration	44--California Pacific Charter - San Diego

**Company name:** California Pacific Charter - San Diego  
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<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	07/06/23	EDME000--Edmentum	20137001898	393.60	Contract for Reading Eggs License 23/24 SY	44--California Pacific Charter - San Diego
	07/06/23	SEES000--Seesaw Learning, Inc.	20137001902	320.00	Contract for 23/24 SY Online Curriculum	44--California Pacific Charter - San Diego
	07/06/23	ARTI001--Art In Action	20137001896	220.80	Art Curriculum for 23/24 SY	44--California Pacific Charter - San Diego
	07/06/23	3PLE000--3P Learning Inc.	20137001901	192.00	Contract for Mathseeds Subscription 23/24 SY	44--California Pacific Charter - San Diego
	07/06/23	METL001--MetLife Small Business Center	20137001893	6,815.44	July Insurance Payment	44--California Pacific Charter - San Diego
	07/07/23	BERK000--Berkshire Hathaway	1880446621TC	2,595.36	Workers Comp Downpayment for 7/1/23-7/1/24 Policy	44--California Pacific Charter - San Diego
	07/07/23	CASBO01--CASBO	101371015	530.67	CASBO Membership 2025-26	44--California Pacific Charter - San Diego
		CASBO01--CASBO	101371015	530.66	CASBO Membership 2023-24	44--California Pacific Charter - San Diego
		CASBO01--CASBO	101371015	530.66	CASBO Membership 2024-25	44--California Pacific Charter - San Diego
	07/10/23	CHAR000--Charter Schools Development Center	101371023	1,050.56	California Charter Schools Leadership Conference Nov 2023	44--California Pacific Charter - San Diego
	07/10/23	CALI003--CaliforniaChoice	101371020	64,156.97	August 2023 Medical Premiums	44--California Pacific Charter - San Diego
	07/10/23	WORL000--Worldwide Express	101371019	321.86	Shipping for CPC-SD (22/23 SY)	44--California Pacific Charter - San Diego
	07/10/23	ALPH000--Alpha Vision, Inc.	101371022	121.28	July-CalPac Datto Monthly Backupify G - Suite Cloud to Cloud Email	44--California Pacific Charter - San Diego
	07/10/23	ALLS001--All Systems Go!	101371017	821.45	Google Ads for July 2023	44--California Pacific Charter - San Diego
	07/11/23	APLU000--APLUS+	20137001920	1,487.47	Aplus+ Conference Registration - Oct 2023	44--California Pacific Charter - San Diego
	07/11/23	PHIL000--Philadelphia Insurance Companies	20137001916	514.56	Participant Accident Coverage 07/01/23-06/30/24	44--California Pacific Charter - San Diego
	07/11/23	DANI001--Danielle Carbonetta	20137001919	21.69	Bagels for Staff Meetings 6/21 & 6/28	44--California Pacific Charter - San Diego
	07/11/23	LISA002--Lisa Mejia Martinez	20137001918	15.00	SoCal Graduation Mileage	44--California Pacific Charter - San Diego
	07/11/23	CCSA001--California Charter Schools Association	20137001915	3,675.00	Membership for the 23/24 SY	44--California Pacific Charter - San Diego
	07/11/23	PROC000--Procopio, Cory, Hargreaves & Savitch LL	20137001914	875.96	Legal Services for April 2023	44--California Pacific Charter - San Diego
	07/11/23	BUCH001--Buchalter	20137001913	21.52	Legal Services for March 2023	44--California Pacific Charter - San Diego
	07/11/23	SEAS001--Carly Stone (Sea Stone Productions)	20137001912	667.40	Post-production Invoice for CalPac Park Day Video Project	44--California Pacific Charter - San Diego
	07/11/23	PROC000--Procopio, Cory, Hargreaves & Savitch LL	20137001911	896.00	Legal Services for July 2023	44--California Pacific Charter - San Diego
	07/13/23	PAYCOM--Paycom - Payroll ACH Withdrawals	101371026	72.96	OBL91 Paycom Access - July 2023	44--California Pacific Charter - San Diego
	07/13/23	JENN001--Jennifer Byus	101371024	5.68	Office Meeting Mileage 4/21/23	44--California Pacific Charter - San Diego
	07/14/23	KELL001--Kelly Rocha	Voided - 101371	(5.64)	Rocha, Kelly - School Pathways Mileage	44--California Pacific Charter - San Diego
	07/14/23	RENA001--Renaissance Learning, Inc.	20137001928	8,312.80	Curriculum for 23/24	44--California Pacific Charter - San Diego

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<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	07/14/23	NORE001--NoRedInk	20137001930	3,056.00	Subscription for 23/24 SY Online Curriculum	44--California Pacific Charter - San Diego
	07/14/23	NEAR001--Nearpod Inc.	20137001932	2,752.00	Contract for 23/24 SY Online Curriculum	44--California Pacific Charter - San Diego
	07/14/23	CLIF000--Clifton Larson Allen LLP	20137001929	560.62	Progress billing for audit services through June 30, 2023	44--California Pacific Charter - San Diego
	07/14/23	IRON000--Iron Mountain	20137001931	155.64	June 2023 Services	44--California Pacific Charter - San Diego
	07/14/23	SCHO000--School Pathways, LLC	20137001927	230.18	Subscription fees true up for 22/23 SY	44--California Pacific Charter - San Diego
	07/17/23	KELL001--Kelly Rocha	20137001948	5.64	Rocha, Kelly - School Pathways Mileage	44--California Pacific Charter - San Diego
	07/20/23	ZOOM000--Zoom	20137001950	166.85	Zoom 500 TB Storage Fee - June 2023	44--California Pacific Charter - San Diego
	07/24/23	JASO000--Jason D. McFaul	1022471811	200.00	July 2023 Board Stipends - JM	44--California Pacific Charter - San Diego
	07/24/23	WILL000--William J Howard Jr.	1022471809	200.00	July 2023 Board Stipends - WH	44--California Pacific Charter - San Diego
	07/24/23	TANY001--Tanya Rogers	1022471813	200.00	July 2023 Board Stipends - TR	44--California Pacific Charter - San Diego
	07/24/23	KELL000--Kelly Wylie	1022471810	200.00	July 2023 Board Stipends - KW	44--California Pacific Charter - San Diego
	07/24/23	SHIR000--Shirley Peterson	1022471812	200.00	July 2023 Board Stipends - SP	44--California Pacific Charter - San Diego
	07/24/23	PART000--Partners in Special Education	101371029	4,290.00	BIS SERVICES ESY 22-23	44--California Pacific Charter - San Diego
	07/24/23	WORL000--Worldwide Express	101371028	117.69	22/23 Shipping for CPC-SD	44--California Pacific Charter - San Diego
		WORL000--Worldwide Express	101371028	13.66	23/24 Shipping for CPC-SD	44--California Pacific Charter - San Diego
	07/24/23	OXFO000--Oxford Consulting Services, Inc.	20137001953	1,558.00	June 2023 Services	44--California Pacific Charter - San Diego
	07/24/23	AMAZ000--Amazon	20137001952	35.54	Office supplies	44--California Pacific Charter - San Diego
	07/24/23	AMAZ000--Amazon	20137001951	3.57	Office supplies	44--California Pacific Charter - San Diego
	07/25/23	UKG0001--UKG	20137001965	1,280.00	Workforce Ready Payroll - Full year of payroll history	44--California Pacific Charter - San Diego
	07/25/23	TURN000--Turnitin LLC	20137001966	1,182.40	Contract for 23/24 SY	44--California Pacific Charter - San Diego
	07/25/23	KMED001--KM Educational Consulting and Executiv	20137001967	50.05	Professional Services - June 2023	44--California Pacific Charter - San Diego
	07/25/23	AMAZ000--Amazon	20137001964	28.75	Office Supplies	44--California Pacific Charter - San Diego
	07/25/23	AMAZ000--Amazon	20137001959	14.37	Office supplies- foot rest for J. Willson	44--California Pacific Charter - San Diego
	07/25/23	AMAZ000--Amazon	20137001961	3.65	Keyboard Cover Skin Compatible with Logitech Erao K860 - Gretchen Chamberlain	44--California Pacific Charter - San Diego
	07/27/23	PATH001--Pathful	20137001969	3,680.00	Licenses for CTE 23/24 SY	44--California Pacific Charter - San Diego
	07/27/23	SCHO000--School Pathways, LLC	20137001970	290.00	Annual Subscription for the 23/24 SY for CPC-SD	44--California Pacific Charter - San Diego
	07/28/23	WORL000--Worldwide Express	101371032	96.85	22/23 Shipping for CPC-SD	44--California Pacific Charter - San Diego
		WORL000--Worldwide Express	101371032	40.55	23/24 Shipping for CPC-SD	44--California Pacific Charter - San Diego
	07/28/23	ECCI000--ECC Imaging LLC.	101371031	4.46	6/11/2023 to 7/10/2023 coverage period	44--California Pacific Charter - San Diego

**Company name:** California Pacific Charter - San Diego  
**Report name:** Check register  
**Created on:** 08/02/23  
**Location:** 44--California Pacific Charter - San Diego

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	07/28/23	SCH000--School Pathways, LLC	20137001983	18,782.64	Annual Subscription for the 23/24 SY for CPC-SD	44--California Pacific Charter - San Diego
	07/28/23	CTL000--CTL Corporation	20137001978	900.00	Google Workspace for EDU Std for San Diego Students	44--California Pacific Charter - San Diego
	07/28/23	AMAZ000--Amazon	20137001976	239.00	Tech Supplies Erin Rineberg	44--California Pacific Charter - San Diego
	07/28/23	AMAZ000--Amazon	20137001972	216.99	ERGONOMIC CHAIR ERIN RINEBERG	44--California Pacific Charter - San Diego
<b>Total for CHASE 1781</b>				<b>165,620.46</b>		



**Company name:** California Pacific Charter - Sonoma  
**Report name:** Check register  
**Created on:** 8/2/2023  
**Location:** 95--California Pacific Charter - Sonoma

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/3/2023	PATX002--Pennsylvania Department of Revenue	1814678469TC	37.46	PA Tax Payments	95--California Pacific Charter - Sonoma
	7/3/2023	PAYCOM--Paycom - Payroll ACH Withdrawals	101371004	2.78	2023 QT2 Quarterly Form Fee	95--California Pacific Charter - Sonoma
	7/3/2023	EVER000--Evergreen Educational Group	101370997	900.00	Contract for 23/24 SY (DLC - Digital Learning)	95--California Pacific Charter - Sonoma
	7/3/2023	HANO000--The Hanover Insurance Group	101370998	573.84	Fidelity and Crime Policy for 23/24	95--California Pacific Charter - Sonoma
	7/3/2023	DELA000--De Lae Landen Financial Services Inc.	101371001	62.14	Copier Lease for July 2023	95--California Pacific Charter - Sonoma
	7/3/2023	WORL000--Worldwide Express	101371000	50.95	Shipping for CPC-SO	95--California Pacific Charter - Sonoma
	7/3/2023	DAIS002--Daisy Carlos	20137001877	7.23	Office Supplies	95--California Pacific Charter - Sonoma
		DAIS002--Daisy Carlos	20137001877	7.05	Office Meeting - Food	95--California Pacific Charter - Sonoma
		DAIS002--Daisy Carlos	20137001877	4.05	Grad Night - Uber	95--California Pacific Charter - Sonoma
		DAIS002--Daisy Carlos	20137001877	20.76	NCSC Conference	95--California Pacific Charter - Sonoma
		DAIS002--Daisy Carlos	20137001877	32.12	NCSC Conference Food	95--California Pacific Charter - Sonoma
		DAIS002--Daisy Carlos	20137001877	22.19	Mileage for Board Meetings	95--California Pacific Charter - Sonoma
		DAIS002--Daisy Carlos	20137001877	2.54	Beverages for Board	95--California Pacific Charter - Sonoma
		DAIS002--Daisy Carlos	20137001877	75.83	NCSC Conference Travel - Flights	95--California Pacific Charter - Sonoma
	7/3/2023	DOCU000--Document Tracking Services	101370995	135.00	Document Tracking Services for 2023/2024	95--California Pacific Charter - Sonoma
	7/3/2023	KATI002--Katie Hawck	20137001878	11.78	Lyft Rides for Conference	95--California Pacific Charter - Sonoma
		KATI002--Katie Hawck	20137001878	12.15	Meals for Conferences	95--California Pacific Charter - Sonoma
		KATI002--Katie Hawck	20137001878	3.51	Toll Charges for FT in SD	95--California Pacific Charter - Sonoma
	7/5/2023	ARNE001--A&R Parcel Three	1869739638TC	943.92	July 2023 Rent	95--California Pacific Charter - Sonoma
	7/5/2023	MICR000--MicroAge	101371014	281.28	Virus Protection for student computers 23-24	95--California Pacific Charter - Sonoma
		MICR000--MicroAge	101371014	281.28	Virus Protection for student computers 24-25	95--California Pacific Charter - Sonoma
		MICR000--MicroAge	101371014	281.28	Virus Protection for student computers 25-26	95--California Pacific Charter - Sonoma
	7/5/2023	NCUST01--National Center for Urban School Transf	101371013	81.90	NCUST Conference Registration for D Carbonetta	95--California Pacific Charter - Sonoma
	7/5/2023	SANJ000--San Joaquin County Office of Education	101371009	351.00	CSC Conference October 2023 registration for 3 staff	95--California Pacific Charter - Sonoma
	7/5/2023	MYST000--Mystery Science, Inc.	101371008	251.10	Science Curriculum Membership for 2023-2024	95--California Pacific Charter - Sonoma
	7/5/2023	ESGI001--ESGI, LLC	101371007	65.88	Assessment License for 23/24 SY	95--California Pacific Charter - Sonoma
	7/5/2023	NCUST01--National Center for Urban School Transf	101371012	45.05	2023 America's Best Schools Symposium Registration - Vangie Akridge	95--California Pacific Charter - Sonoma
	7/5/2023	DONA001--Donald McLeish	101371005	13.11	Meals Sped Testing McLeish, Donald	95--California Pacific Charter - Sonoma
		DONA001--Donald McLeish	101371005	522.04	Mileage for Sped Testing - McLeish, Donald	95--California Pacific Charter - Sonoma
	7/5/2023	RING000--RinaCentral	20137001889	507.84	Monthly phone bill - June 2023	95--California Pacific Charter - Sonoma
	7/5/2023	STAP001--Staples Technology Solutions	20137001888	743.31	LENOVA 500E CB'S SO (3)	95--California Pacific Charter - Sonoma



**Company name:** California Pacific Charter - Sonoma  
**Report name:** Check register  
**Created on:** 8/2/2023  
**Location:** 95--California Pacific Charter - Sonoma

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/5/2023	CHRI001--Christine Feher	20137001891	320.86	Hotel - NorCal Grad	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	13.73	Board Meeting Mileage	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	2.62	Lock - Extra Storage	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	66.06	Hotel - NCSC Austin	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	8.44	Uber - NCSC Austin	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	107.58	Airline - NCSC Austin	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	20.00	Parking - NorCal Grad	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	6.88	Parking - NCSC Austin	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	1.67	Mileage - NCSC Austin	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	21.59	Food - NCSC Austin	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	6.29	Arbitration Lunch	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	10.22	Mileage - NorCal Grad	95--California Pacific Charter - Sonoma
		CHRI001--Christine Feher	20137001891	322.89	Airline - NorCal Grad	95--California Pacific Charter - Sonoma
	7/5/2023	GRET000--Gretchen Chamberlain	20137001890	9.16	Chamberlain, G Mileage Board Meeting	95--California Pacific Charter - Sonoma
		GRET000--Gretchen Chamberlain	20137001890	4.41	Postage for Staff	95--California Pacific Charter - Sonoma
	7/5/2023	BUCH001--Buchalter	20137001892	10.57	Legal services for June 2023	95--California Pacific Charter - Sonoma
	7/5/2023	CORW001--Corwin Press, Inc.	20137001884	201.60	Virtual PLC + Activators Guide Institute For 5 Staff	95--California Pacific Charter - Sonoma
	7/5/2023	VICT000--Victoria Law	20137001880	118.01	Reimbursement for Victoria Law- SPED protocols	95--California Pacific Charter - Sonoma
	7/5/2023	JILLT001--Jill Tanner	20137001881	30.48	MILEAGE/PARKING/TOLLS BOARD MEETING - TANNER, JILL	95--California Pacific Charter - Sonoma
		JILLT001--Jill Tanner	20137001881	1.47	SNACK/DRINK FOR BOARD MEETING - TANNER, JILL	95--California Pacific Charter - Sonoma
		JILLT001--Jill Tanner	20137001881	35.06	HOTEL FOR BOARD MEETING - TANNER, JILL	95--California Pacific Charter - Sonoma
	7/5/2023	SHAN000--Shannon Green	20137001882	4.90	Mileage to SMF Airport	95--California Pacific Charter - Sonoma
		SHAN000--Shannon Green	20137001882	35.06	Hotel - In-Person June 2023 Board Meeting	95--California Pacific Charter - Sonoma
		SHAN000--Shannon Green	20137001882	3.93	Parking - In-Person June 2023 Board Meeting	95--California Pacific Charter - Sonoma
		SHAN000--Shannon Green	20137001882	12.16	Meals - In-Person June 2023 Board Meeting	95--California Pacific Charter - Sonoma
		SHAN000--Shannon Green	20137001882	4.65	Printer Paper	95--California Pacific Charter - Sonoma
	7/6/2023	DEBI001--Debi Huber	20137001905	0.68	Mileage for TB Test	95--California Pacific Charter - Sonoma
		DEBI001--Debi Huber	20137001905	4.10	TB Test	95--California Pacific Charter - Sonoma
		DEBI001--Debi Huber	20137001905	16.52	Mileage for Disneyland Field Trip	95--California Pacific Charter - Sonoma
	7/6/2023	KAJE000--Kaieet, Inc	20137001903	2,822.54	Contract for 23/24 SY Hotspots	95--California Pacific Charter - Sonoma
	7/6/2023	GOGU000--GoGuardian	20137001904	2,643.84	Contract for 23/24 SY Educational Technology	95--California Pacific Charter - Sonoma
	7/6/2023	ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,663.90	Alludo Licenses for 23/24 Professional Development	95--California Pacific Charter - Sonoma
		ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,663.90	Alludo Licenses for 25/26 Professional Development	95--California Pacific Charter - Sonoma
		ALPE001--Alpenspruce Education Solutions, Inc.	20137001897	2,663.90	Alludo Licenses for 24/25 Professional Development	95--California Pacific Charter - Sonoma
	7/6/2023	PADL001--Padlet	20137001895	270.00	Software for Student Collaboration	95--California Pacific Charter - Sonoma

**Company name:** California Pacific Charter - Sonoma  
**Report name:** Check register  
**Created on:** 8/2/2023  
**Location:** 95--California Pacific Charter - Sonoma

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/6/2023	EDME000--Edmentum	20137001898	221.40	Contract for Reading Eggs License 23/24 SY	95--California Pacific Charter - Sonoma
	7/6/2023	SEES000--Seesaw Learning, Inc.	20137001902	180.00	Contract for 23/24 SY Online Curriculum	95--California Pacific Charter - Sonoma
	7/6/2023	ARTI001--Art In Action	20137001896	124.20	Art Curriculum for 23/24 SY	95--California Pacific Charter - Sonoma
	7/6/2023	3PLE000--3P Learning Inc.	20137001901	108.00	Contract for Mathseeds Subscription 23/24 SY	95--California Pacific Charter - Sonoma
	7/7/2023	BERK000--Berkshire Hathaway	1880446621TC	1,459.89	Workers Comp Downpayment for 7/1/23-7/1/24 Policy	95--California Pacific Charter - Sonoma
	7/7/2023	CASBO01--CASBO	101371015	298.50	CASBO Membership 2025-26	95--California Pacific Charter - Sonoma
		CASBO01--CASBO	101371015	298.50	CASBO Membership 2023-24	95--California Pacific Charter - Sonoma
		CASBO01--CASBO	101371015	298.50	CASBO Membership 2024-25	95--California Pacific Charter - Sonoma
	7/10/2023	CHAR000--Charter Schools Development Center	101371023	590.94	California Charter Schools Leadership Conference Nov 2023	95--California Pacific Charter - Sonoma
	7/10/2023	WORL000--Worldwide Express	101371019	327.87	Shipping for CPC-SO (22/23 SY)	95--California Pacific Charter - Sonoma
	7/10/2023	ALPH000--Alpha Vision, Inc.	101371022	68.22	July-CalPac Datto Monthly Backupify G - Suite Cloud to Cloud Email	95--California Pacific Charter - Sonoma
	7/10/2023	ALLS001--All Svstems Go!	101371017	462.07	Google Ads for July 2023	95--California Pacific Charter - Sonoma
	7/11/2023	APLU000--APLUS+	20137001920	836.70	Aplus+ Conference Registration - Oct 2023	95--California Pacific Charter - Sonoma
	7/11/2023	PHIL000--Philadelphia Insurance Companies	20137001916	289.44	Participant Accident Coverage 07/01/23-06/30/24	95--California Pacific Charter - Sonoma
	7/11/2023	DANI001--Danielle Carbonetta	20137001919	10.65	Bagels for Staff Meetings 6/21 & 6/28	95--California Pacific Charter - Sonoma
	7/11/2023	UNPL001--Unplug Studio LLC	20137001917	50.00	Hosting and Maintenance CalPacSO - July 2023	95--California Pacific Charter - Sonoma
	7/11/2023	CCSA001--California Charter Schools Association	20137001915	1,920.00	Membership for the 23/24 SY	95--California Pacific Charter - Sonoma
	7/11/2023	PROC000--Procopio, Cory, Hargreaves & Savitch LL	20137001914	429.98	Legal Services for April 2023	95--California Pacific Charter - Sonoma
	7/11/2023	BUCH001--Buchalter	20137001913	10.57	Legal Services for March 2023	95--California Pacific Charter - Sonoma
	7/11/2023	SEAS001--Carly Stone (Sea Stone Productions)	20137001912	327.60	Post-production Invoice for CalPac Park Day Video Project	95--California Pacific Charter - Sonoma
	7/11/2023	PROC000--Procopio, Cory, Hargreaves & Savitch LL	20137001911	504.00	Legal Services for July 2023	95--California Pacific Charter - Sonoma
	7/13/2023	PAYCOM--Paycom - Payroll ACH Withdrawals	101371026	41.04	0BL91 Paycom Access - July 2023	95--California Pacific Charter - Sonoma
	7/13/2023	JENN001--Jennifer Byus	101371024	2.79	Office Meeting Mileage 4/21/23	95--California Pacific Charter - Sonoma
	7/14/2023	KELL001--Kelly Rocha	Voided - 10137	-2.77	Rocha, Kelly - School Pathways Mileage	95--California Pacific Charter - Sonoma
	7/14/2023	RENA001--Renaissance Learning, Inc.	20137001928	4,675.95	Curriculum for 23/24	95--California Pacific Charter - Sonoma

**Company name:** California Pacific Charter - Sonoma  
**Report name:** Check register  
**Created on:** 8/2/2023  
**Location:** 95--California Pacific Charter - Sonoma

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/14/2023	NORE001--NoRedInk	20137001930	1,719.00	Subscription for 23/24 SY Online Curriculum	95--California Pacific Charter - Sonoma
	7/14/2023	NEAR001--Nearpod Inc.	20137001932	1,548.00	Contract for 23/24 SY Online Curriculum	95--California Pacific Charter - Sonoma
	7/14/2023	CLIF000--Clifton Larson Allen LLP	20137001929	275.18	Progress billing for audit services through June 30, 2023	95--California Pacific Charter - Sonoma
	7/14/2023	IRON000--Iron Mountain	20137001931	76.39	June 2023 Services	95--California Pacific Charter - Sonoma
	7/14/2023	SCHO000--School Pathways, LLC	20137001926	259.18	Subscription fees true up for 22/23 SY	95--California Pacific Charter - Sonoma
	7/17/2023	KELL001--Kelly Rocha	20137001948	2.77	Rocha, Kelly - School Pathways Mileage	95--California Pacific Charter - Sonoma
	7/20/2023	DONA001--Donald McLeish	101371027	63.64	Meals for NorCal Testing Trip	95--California Pacific Charter - Sonoma
	7/20/2023	ZOOM000--Zoom	20137001950	81.90	Zoom 500 TB Storage Fee - June 2023	95--California Pacific Charter - Sonoma
	7/24/2023	JASO000--Jason D. McFaul	1022471811	200.00	July 2023 Board Stipends - JM	95--California Pacific Charter - Sonoma
	7/24/2023	WILL000--William J Howard Jr.	1022471809	200.00	July 2023 Board Stipends - WH	95--California Pacific Charter - Sonoma
	7/24/2023	TANY001--Tanya Roqers	1022471813	200.00	July 2023 Board Stipends - TR	95--California Pacific Charter - Sonoma
	7/24/2023	KELL000--Kelly Wylie	1022471810	200.00	July 2023 Board Stipends - KW	95--California Pacific Charter - Sonoma
	7/24/2023	SHIR000--Shirley Peterson	1022471812	200.00	July 2023 Board Stipends - SP	95--California Pacific Charter - Sonoma
	7/24/2023	GUER000--Guerneville School District - Business De	101371030	22,709.00	Quarter 3 & 4 Fiscal Oversight Fees	95--California Pacific Charter - Sonoma
	7/24/2023	WORL000--Worldwide Express	101371028	74.44	22/23 Shipping for CPC-SO	95--California Pacific Charter - Sonoma
	7/24/2023	AMAZ000--Amazon	20137001952	17.45	Office supplies	95--California Pacific Charter - Sonoma
	7/24/2023	AMAZ000--Amazon	20137001951	1.76	Office supplies	95--California Pacific Charter - Sonoma
	7/25/2023	UKG0001--UKG	20137001965	720.00	Workforce Ready Payroll - Full year of payroll historv	95--California Pacific Charter - Sonoma
	7/25/2023	TURN000--Turnitin LLC	20137001966	665.10	Contract for 23/24 SY	95--California Pacific Charter - Sonoma
	7/25/2023	KMED001--KM Educational Consulting and Executiv	20137001967	24.57	Professional Services - June 2023	95--California Pacific Charter - Sonoma
	7/25/2023	AMAZ000--Amazon	20137001964	14.12	Office Supplies	95--California Pacific Charter - Sonoma
	7/25/2023	AMAZ000--Amazon	20137001959	7.05	Office supplies- foot rest for J. Willson	95--California Pacific Charter - Sonoma
	7/25/2023	ALIC001--Alice Pak	20137001954	25.45	Meal for NorCal Graduation	95--California Pacific Charter - Sonoma
	7/25/2023	AMAZ000--Amazon	20137001961	1.79	Keyboard Cover Skin Compatible with Logitech Ergo K860 - Gretchen Chamberlain	95--California Pacific Charter - Sonoma
	7/27/2023	PATH001--Pathful	20137001969	2,070.00	Licenses for CTE 23/24 SY	95--California Pacific Charter - Sonoma

**Company name:** California Pacific Charter - Sonoma  
**Report name:** Check register  
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**Location:** 95--California Pacific Charter - Sonoma

Bank	Date	Vendor	Document no.	Amount applied	Memo	Location
<b>CHASE 1781 - Chase Bank - Main</b>		<b>Account no: 505911781</b>				
	7/28/2023	WORL000--Worldwide Express	101371032	43.40	22/23 Shipping for CPC-SO	95--California Pacific Charter - Sonoma
		WORL000--Worldwide Express	101371032	34.88	23/24 Shipping for CPC-SO	95--California Pacific Charter - Sonoma
	7/28/2023	ECCI000--ECC Imaging LLC.	101371031	2.51	6/11/2023 to 7/10/2023 coverage period	95--California Pacific Charter - Sonoma
	7/28/2023	SCHO000--School Pathways, LLC	20137001981	11,516.50	Annual Subscription for the 23/24 SY for CPC-SO	95--California Pacific Charter - Sonoma
	7/28/2023	CTL000--CTL Corporation	20137001977	525.00	Google Workspace for EDU Std for Sonoma Students	95--California Pacific Charter - Sonoma
<b>Total for CHASE :</b>	7/28/2023	SCHO000--School Pathways, LLC	20137001979	290.00	Annual Subscription for the 23/24 SY for CPC-SO	95--California Pacific Charter - Sonoma
				<b>78,763.16</b>		

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# HATCH & CESARIO

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ATTORNEYS-AT-LAW

June 5, 2023

*Sent Via Email Only: (cfeher@cal-pacs.org)*

Christine Feher, Executive Director  
California Pacific Charter Schools  
4101 Birch St. #150  
Newport Beach, CA 92660

Re: Legal Services Agreement

Dear Christine:

Attached for your consideration is Hatch & Cesario's Agreement for Legal Services for the 2023-2024 fiscal year.

If this agreement meets with your approval, please place your initials and signature on page 3 of the agreement and provide me with a copy of this page. Also, attached is Hatch & Cesario's W-9 form with our tax identification number for your records.

Thank you for choosing Hatch & Cesario, and we look forward to continuing to support California Pacific Charter Schools.

Appreciatively,

HATCH & CESARIO, Attorneys-at-Law

  
Deborah R.G. Cesario

Enclosures: 2023-2024 Agreement for Legal Services  
W-9

10531 4S Commons Drive, Suite 583  
San Diego, CA 92127  
debbie@hatchcesariolaw-sd.com  
(858) 943-4200 Office & Fax  
www.hatchcesariolaw.com

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# HATCH & CESARIO

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ATTORNEYS-AT-LAW

## **AGREEMENT FOR LEGAL SERVICES**

**July 1, 2023 – June 30, 2024**

This Agreement is by and between California Pacific Charter Schools (“Client”) and Hatch & Cesario, Attorneys-at-Law (“Attorney”).

### **Attorney’s Services**

Attorney agrees to provide Client with consulting, representational and legal services pertaining to special education and general student matters, including representation in administrative and judicial proceedings, as requested by Client, or as required by law. A separate agreement may be required for legal proceedings in state or federal court.

Attorney shall provide legal services as reasonably required to represent Client in such matters, take reasonable steps to keep Client informed of significant developments, and respond to Client’s inquiries regarding those matters. Client understands that Attorney cannot guarantee any particular results, including the costs and expenses of representation.

### **Hourly Rates**

Client agrees to pay Attorney for services rendered based upon the following rate schedule:

Partners	\$350.00
Of-Counsel	\$350.00
Senior Associate	\$320.00
Associate	\$305.00
Education Consultant	\$210.00
Senior/Certified Paralegal	\$215.00
Paralegal	\$205.00

Attorney shall bill Client for legal services in one-tenth (.10) increments.

### **Costs, Expenses and Other Requirements Applicable to Client**

Client agrees to reimburse Attorney for necessary costs and expenses incurred by Attorney on behalf of Client, including the following:

In-office Photocopying	\$0.25 per page
Outside Photocopying	Actual usage
Facsimile/Scanning	None

Postage  
Mileage

Actual usage  
IRS mileage rate

Costs, such as electronic legal research services, messenger, meals, and lodging shall be charged on an actual and necessary basis.

### **Payment for Services**

Attorney shall send Client a statement for fees and costs incurred every calendar month. Such statements shall set forth the amount, rate, and description of services provided. Payment by Client against monthly billings is due upon receipt of statements and is considered delinquent if payment is not received within thirty (30) days of the date of the invoice.

The California Business & Professions Code requires Attorney to inform you whether we maintain errors and omissions insurance coverage applicable to the services to be rendered to you. We hereby confirm that Attorney does maintain such insurance coverage.

### **Legal Fees and Costs Covered by JPA or Insurance Policy**

When the Client is named as a party in an administrative or court proceeding, the Client may have coverage under a joint powers authority ("JPA") memorandum of understanding or liability insurance policy for legal fees and related costs. We recommend that any new filings against Client be tendered to a representative of the JPA or your insurer as soon as you are served.

If you have coverage and wish to work with Attorney, it will agree to represent you at the rates set forth by this Agreement unless the Attorney and Client agree otherwise. Attorney will also agree to follow all litigation guidelines in effect and will not charge for expenses not otherwise authorized.

At times, a JPA or insurer may decline to pay for legal fees or expenses that are otherwise covered and acceptable under the applicable guidelines. Attorney will follow all established appeal procedures to negotiate any declined items with the JPA or insurer.

If, after the appeals process, the JPA or insurer continues to deny payment without a good faith basis, Attorney will require that Client pay those fees directly. Any fees chargeable to the Client will continue to be at the rates set forth by this Agreement unless the Attorney and Client agree otherwise.

### **Discharge of Services**

Client may discharge Attorney at any time by written notice. Unless otherwise agreed, and except as required by law, Attorney will provide no further legal services hereunder after receipt of such notice. Attorney may withdraw its services with Client's consent or as allowed or required by law, upon ten (10) days written notice. Upon discharge or withdrawal, Attorney shall transition all outstanding legal work and services to others, as Client shall direct.



**Mediation**

If a dispute arises out of or relating to any aspect of this Agreement between Client and Attorney, or the breach thereof, and if the dispute cannot be settled through negotiation, Client and Attorney agree to first try in good faith to settle the dispute in private by the use of mediation before initiating any arbitration, litigation, or any other dispute resolution procedure. The cost of such mediation shall be borne equally by the parties, unless otherwise stipulated in a settlement agreement between the parties. Either party may initiate mediation through service of a written demand in-person or by mail or, if agreed to by the parties in advance, by e-mail to the opposing party. The mediation session will occur at a time mutually agreed upon by the parties in consultation with a mutually selected mediator, though no later than 60 days after the date of service of the initial notice, unless otherwise agreed by the parties and mediator.

By initialing below, Client and Attorney confirm that they have read and understand the paragraph above, and voluntarily agree to mediation. By this Agreement, Attorney has advised Client of the right to have an independent lawyer of Client's choice to review this mediation provision, and this entire agreement, prior to initialing this provision or signing this Agreement.

\_\_\_\_\_ (Client Initial Here)      JRC (Attorney Initial Here)

**Term of Agreement**

The term of this Agreement is effective July 1, 2023 through June 30, 2024, and may be modified in writing by mutual agreement of Client and Attorney. This Agreement shall be terminable by either Attorney or Client upon thirty (30) days written notice.

California Pacific Charter Schools

Hatch & Cesario - Attorneys-at-Law

\_\_\_\_\_  
Christine Feher,  
Executive Director

Deborah R.G. Cesario  
Deborah R.G. Cesario, Partner

\_\_\_\_\_  
Date

June 5, 2023  
\_\_\_\_\_  
Date



Form **W-9**  
(Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Law Offices of Deborah R.G. Cesario</b>		
	2 Business name/disregarded entity name, if different from above <b>Doing business as Hatch &amp; Cesario, Attorneys-at-Law</b>		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶ _____		
	<input type="checkbox"/> C Corporation <input checked="" type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate		
	5 Address (number, street, and apt. or suite no.) See instructions. <b>10531 4S Commons Drive, Suite 583</b>		Requester's name and address (optional)
	6 City, state, and ZIP code <b>San Diego, CA 92127</b>		
7 List account number(s) here (optional)			

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>									
<b>or</b>									
<b>Employer identification number</b>									
4	7	-	2	9	0	8	1	8	5

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶ <b>June 5, 2023</b>
------------------	----------------------------	----------------------------

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

serialNumber	model	annotatedAssetId
4K9V9FDR329581L	Samsung 4	LA-20210445
MP1BWATG	LENOVO V720	LAPTOP
CND1054JXB	HP 250 G7	LAPTOP
MP1RR25K	LENOVO IDEAPAD S340	LAPTOP
KCLMTF098605	Asus MB168B	Extended Monitor
PC-1HBJK9	LENOVO Thinkpad X390	Laptop
MP1C3QNH	LENOVO V720	LAPTOP
CND1054JV0	HP 250 G7	LAPTOP
PF1A9PBV	LENOVO IDEAPAD 3	LAPTOP
4WQR9FBR321551P	Samsung 4	Chromebook
KCLMTF098521	Asus MB168B	Extended Monitor
MP1JY8CG	LENOVO IDEAPAD S340	LAPTOP
5CD01400JDP	HP 11 G8 EE	CHROMEBOOK
MP1J2V3K	LENOVO IDEAPAD S340	LAPTOP
MP1J3XJ9	LENOVO IDEAPAD S340	LAPTOP
MP1RR7D2	LENOVO IDEAPAD S340	LAPTOP
SERVICE TAG 4W54CL2	HP P58F	LAPTOP
5CD102CFCW	HP PAVILION 14	LAPTOP
CND0412XR1	HP 250 G7	LAPTOP
L8NXCV01S512322	Asus C423N	CHROMEBOOK
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4K9V9FER216613B	Samsung Chromebook 4	SO-20210237

# Coversheet

## Consent - Education/Student Services

**Section:** X. Consent  
**Item:** B. Consent - Education/Student Services  
**Purpose:**  
**Submitted by:**  
**Related Material:** 2023-24 English Learner Master Plan.pdf  
Title 1.pdf

MASTER PLAN  
for  
ENGLISH LEARNERS  
California Pacific Charter Schools

Approved by the California Pacific Charter School Board of Trustees (August 8, 2023)

Kelly Wylie, President  
Dr. Shirley Peterson, Vice President  
Tanya Rogers, Clerk  
Bill Howard, Member  
Jason McFaul, Member

Presented by: Christine Feher, Superintendent

**EL Master Plan Committee Members:**

Gretchen Chamberlain  
Ericka Zemmer  
Dr. Vangie Akridge

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### **Mission and Vision**

CalPac's mission is to support and encourage all students to relentlessly pursue their life goals by providing an accessible, inclusive, and personalized learning community.

California Pacific Charter Schools, in partnership with our community, will:

- Foster an enriching school environment to nurture individuals academically, socially, and emotionally so that they are equipped to tackle academic challenges and become productive, responsible, ethical, creative, and compassionate members of society.
- Forge strong, positive connections with students so they can build confidence, achieve independence, meet current and future challenges, develop social awareness, civic responsibility, and personal growth.
- Provide our graduates with a foundation that will enable them to be college and career prepared and to succeed in their post secondary endeavors.

### **Goals and Vision for English Learner Master Plan**

Federal case law (*Castañeda vs. Pickard*, 648 F.2d 989, 1981) requires that the main goals of the English Learner Program (ELP) are to develop the English language fluency of each English Learner as effectively and as efficiently as possible, and to develop mastery of the core curriculum comparable to native English speakers.

The court set forth the following standards for effective programs for English Learners:

1. The program is based on educational theory that is research-based, has proven methodology, and is recognized by experts in the field.
2. The programs or practices used are calculated to effectively implement the adopted theory, and
3. The program successfully produces results that indicate that language barriers are being overcome.

The ultimate goal of the California Pacific Charter School's English Learner Program is to embrace the Federal case law and support each English Learner. The school's Master Plan for English Learners serves as a standard for consistent program implementation and evaluation of services for English Learners. With a common staff understanding of the goals and procedures, English Learners will receive consistent high-quality services designed to meet their academic and linguistic needs by:

- Providing all students with the opportunity to participate in high quality curricular activities that address academic standards
- Offering programs based on student need and sound educational pedagogy
- Maintaining consistent communication with parents
- Providing staff and parent training
- Embracing parent involvement in the educational process
- Providing a process for monitoring the effectiveness of the program
- Valuing bi-literacy as a skill that will assist the student in life

### **Home Language Survey**

For all students in TK–12, upon first enrollment in a California public school, the Local Education Agency (LEA) uses a standardized procedure to determine a student's primary language. This procedure begins with a home language survey (HLS), which is completed once by the parent or guardian at the time the student is initially enrolled in a California public school. The HLS should not be readministered every year



nor readministered if a student enrolls in a new LEA. If the HLS is completed in error, the parent or guardian may make a request to change it prior to the assessment. However, once a student is identified as an EL on the basis of the results of the Initial ELPAC, and the student has been administered the Summative ELPAC, changing the HLS will not change the student's identification. While cumulative student records are in transit for a student transferring from another California School District, CALPADS shall be used to determine whether a student has a history of being an English Language Learner.

If a student has a history of being an English Learner, they will be given an annual Summative ELPAC assessment during the February 1st through May 31st test window. If a student is new to the California Public School System and answers any of the first three questions of the Home Language Survey (HLS) with a language other than English, further research will be done to determine if they will be given an Initial ELPAC assessment within 30 days of enrollment.

### **ELPAC Testing**

State law (California Education Code [EC] sections 313 and 60810) and federal law (Titles I and III of the Every Student Succeeds Act [ESSA], the reauthorization of the Elementary and Secondary Education Act [ESEA]) require that LEAs administer a state test of English language proficiency (ELP) and develop an English Learner Progress Indicator (ELPI) for (1) newly enrolled students whose primary language is not English, as an initial assessment; and (2) students who are English Learners (ELs), as a summative assessment. For California's public school students, this test is the ELPAC.

The Initial ELPAC has one purpose:

- To identify students who are ELs or are initial fluent English proficient (IFEP)

The Summative ELPAC has two purposes:

- To determine the level of ELP of EL students
- To assess the progress of EL students in acquiring the skills of listening, speaking, reading, and writing in English

All students in kindergarten through grade twelve (K–12), ages three through twenty-one, whose primary language is a language other than English must take the Initial ELPAC to determine whether they are ELs. This must be done within 30 calendar days after they are first enrolled in a California public school or 60 calendar days prior to instruction, but not before July 1, per ELPAC regulations. The Summative ELPAC must be given annually to students identified as ELs until they are reclassified to Fluent English Proficient (RFEP).

### **Using Initial and Summative Assessment Results**

Once tests are scored by the testing agency, individual student score reports (SSRs) are loaded directly to both the parent and student portals of the school's student information system from the Test Operation Management System. Once scores are received, parents will also be informed of test results within 30 calendar days from the first day of the current school year via email and/or through US mail. Parents/guardians are notified of results in writing in a language they can understand (or orally, if they are unable to understand written communication). Parents will also be notified in any language of which 15% or more of the student population speaks in common. Additionally, each student's test results are uploaded to the charter's student information system and recorded on the English Language Master Tracking Spreadsheet. When a student withdraws from California Pacific Charter School, a list of the student's test results will be printed from the student information system and included in the student's requested cumulative file.

ELPAC results are not used to measure academic achievement. The Initial ELPAC results are used to identify ELs who need to develop their skills in listening, speaking, reading, and writing in English. This information, used with other local assessments, assists LEAs and schools when making placement decisions for new students who are identified as ELs. The Initial ELPAC results also are used to identify students who are IFEP and are able to participate in the regular (core) academic program without further English language supports. The Summative ELPAC results are used to see how well ELs are progressing annually toward ELP. (English Language Proficiency) This information is used to assist LEAs and schools in the ongoing process of program monitoring and evaluation. The Summative ELPAC results also form one of four criteria used to determine whether ELs are ready to be classified as RFEP on the basis of the reclassification process developed by the LEA, in accordance with state law.

### **Initial ELPAC Student Score Reports**

The official score for the Initial ELPAC is produced once the LEA has entered and locked in the student's raw scores into the state assessment system. Individual student Initial ELPAC results include an overall scale score, which will indicate which of the three performance levels the student achieved: IFEP, Intermediate EL, and Novice EL.

There will be two composite performance levels produced: Oral Language (Speaking and Listening) and Written Language (Reading and Writing). The three performance levels are well developed, somewhat to moderately developed, and minimally developed.

The Initial ELPAC report includes the following information:

- An Overall performance level and scale score
- A performance level for each composite tested (Oral and Written Language)

Initial ELPAC Performance Level Descriptors are:

- Initial Fluent English Proficient (IFEP): Students at this level have well developed 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 California English Language Development Standards, Kindergarten Through Grade 12 (2012 ELD Standards).
- Intermediate English Learner: Students at this level have somewhat developed to moderately developed 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 ELD Standards.
- Novice English Learner: Students at this level have minimally developed 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 ELD Standards.

### **Summative ELPAC Student Score Reports**

The official score for the Summative ELPAC is produced by the test contractor. Individual student Summative ELPAC results include an overall scale score and two composite scale scores which will indicate which of the four performance levels the student achieved. The four performance levels are: well developed (4), moderately developed (3), somewhat developed (2), and minimally developed (1).

Domain level performance will be reported as beginning, intermediate, and well developed on the ELPAC Student Score Reports. The Summative ELPAC report includes the following information:

- An Overall performance level and scale score
- A performance level and scale score for each composite tested (Oral and Written Language)
- A performance level for each domain tested (Listening, Speaking, Reading, and Writing)

Scale score ranges for each of the four performance levels are identified for Overall, Oral Language, and Written Language for all grades tested. These ranges incorporate the performance level cut scores approved by the SBE.

The Summative ELPAC Performance Level Descriptors are:

- Level 4: English Learners at this level have well developed 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 California English Language Development Standards, Kindergarten Through Grade 12 (CA ELD Standards).
- Level 3: English Learners at this level have moderately developed 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. They need light-to-minimal linguistic support to engage in familiar social and academic contexts; they need moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the “Expanding” proficiency level through the lower range of the “Bridging” proficiency level as described in the CA ELD Standards.
- Level 2: English Learners at this level have somewhat developed 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. They need moderate-to-light linguistic support to engage in familiar social and academic contexts; they need substantial-to-moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the low- to mid-range of the “Expanding” proficiency level as described in the CA ELD Standards.
- Level 1: English Learners at this level have minimally developed 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 CA ELD Standards.

### **English Language Development (ELD) Standards**

The state-adopted ELD Standards establish a framework for teachers to follow as they facilitate students' development of the skills necessary to meet grade-level standards in English language arts and the content areas. The standards describe what students should know and be able to do at each of the five levels of English proficiency. Each ELD standard is tied to one or more of the grade level English Language Arts Standards and serves as a measure for determining a student's progress toward meeting the English Language Arts Standards. When students attain the early advanced proficiency level, they are expected to be reclassified and meet the same rigorous grade-level standards as native English speakers are expected to master.

Charter schools enrolling English Learners have a dual obligation, as do all LEAs, to provide a program for EL students designed to overcome language barriers and provide access to the core curriculum (Castañeda v. Pickard 648 F.2d 989, [5th Cir. 1981]). The CDE recognizes that both services, including classified ELD, must be an integral part of a comprehensive program for every English Learner. The CDE has informed administrators that charter schools are required to provide English learner instructional services that meet this dual obligation, and other services determined necessary by the charter school, immediately.

**Link to ELD Standards:** <http://www.cde.ca.gov/sp/el/er/documents/eldstndpublication14.pdf>

### **English Language Mainstream Program**

English Learners in California Pacific Charter School will be placed in an English Language Mainstream Program. This instructional program is designed to promote the acquisition of high levels of English language proficiency, as well as access to the core curriculum. In the mainstream English program, English is the language of instruction for all subjects with no primary language support. Students in an English Language Mainstream Program will be supported by their primary instructor through the use of SDAIE strategies. Students may also be concurrently enrolled in an ELD support class. English Learners in the English Language Mainstream Program will receive ELD instruction until they are reclassified as English proficient. In the English Language Mainstream Program of California Pacific Charter School:

- Core instruction in language arts, math, science and social science is taught in English using charter approved curriculum and SDAIE methodology
- English Language Learners receive ELD instruction which addresses the ELD standards in listening, speaking, reading and writing.
- Teachers working with EL students will be appropriately authorized, i.e. CLAD or equivalent.

### **SDAIE (Specially Designed Academic Instruction in English)**

SDAIE is instruction in a subject area, delivered in English, that is specially designed to meet the needs of limited-English-proficient pupils. Academic instruction through English is modified to meet the student's level of language proficiency. Teachers use specialized strategies that enable students to understand, participate in and access the core curriculum. SDAIE is an instructional methodology, not a program. (EC 44253.2[b]).

#### *SDAIE Strategies:*

- Front load academic vocabulary
- Visuals and realia
- Manipulatives available
- Activate prior knowledge

- Speak slowly and use repetition
- Focus on the meaning
- Graphic organizer/Charts
- Preview-Review
- Gestures and facial expressions
- Self-selected reading
- Scaffolding (visual content, graphic organizers, sentence frames)
- Consistent and Immediate Feedback
- Summarizing and Re-Teaching
- Reciprocal Teaching

### **English Language Development (ELD) Instruction**

English Learners in the California Pacific Charter School participate in an instructional program that supports their acquisition of informal English and teaches them the patterns of formal academic English. The instruction is designed to provide for student experiences with English that are understandable and meaningful, enable the students to communicate with peers and adults, and thereby participate fully in the academic program. California Pacific Charter School will create a personalized pathway of ELD instruction to build skills in English Language Arts (ELA). Students will take a diagnostic assessment at the beginning of the course to identify skill gaps. These students will have a targeted approach to building the specific skills that they need. Additionally, students may receive tutoring support services.

### **Instructional Materials to Support the CA CCSS (Common Core State Standards) for ELA/Literacy and CA ELD Standards**

The State Board of Education adopts instructional materials for use by students in kindergarten through grade eight. LEAs- school districts, charter schools, and county offices of education- ARE NOT required to purchase state-adopted instructional materials according to EC Section 60210(a). If an LEA chooses to use non-adopted materials, it has the responsibility to adopt materials that best meet the needs of its students and to conduct its own evaluation of instructional materials. The review must include a majority of classroom teachers from that content area or grade-level ED Section 60210(c). EC Section 60002 requires the LEA to promote the involvement of parents and other members of the community in the selection of instructional materials, in addition to teacher involvement.

*ELA/literacy and ELD curricula should be well designed, comprehensive, and integrated.*

The ability to read, write, and communicate with competence and confidence in English across a range of personal and academic contexts expands students' opportunities for career and college success, full and wise participation in a democratic society and global economy, and achievement of their personal aspirations. Moreover, skill in literacy and language provides individuals with access to extraordinary and powerful literature that widens perspectives, illuminates the human experience, and deepens understandings of self and others.

The CA ELD Standards are aligned to the CA CCSS for ELA/Literacy as they amplify (magnify and make clear) areas of English language development that are crucial for academic learning. The standards emphasize language learning as a social process and language itself as a complex and dynamic meaning-making resource. They promote the notion of supporting English Learners to develop awareness that different languages and variations of English exist and that their home languages and cultures are valuable resources in their own right and useful for building proficiency in English.

## Key Themes of ELA/Literacy and ELD Instruction

### **Instruction focuses on...**

#### **Meaning Making**

Meaning making is at the heart of ELA/literacy and ELD instruction. It is the central purpose for interacting with text, producing text, engaging in research, participating in discussion, and giving presentations. It is the reason for learning the foundational skills and for expanding language. Meaning making includes literal understanding but is not confined to it at any grade or with any student. Inference making and critical reading, writing, and listening are given substantial and explicit attention in every discipline. Among the contributors to meaning making are language, knowledge, motivation, and in the case of reading and writing, the ability to recognize printed words and use the alphabetic code to express ideas.

#### **Language Development**

Language is the cornerstone of literacy and learning. It is with and through language that students learn, think, and express information, ideas, perspectives, and questions. The strands of the CA CCSS for ELA/ Literacy—Reading, Writing, Speaking and Listening, and Language—all have language at the core, as do the parts of the CA ELD Standards—Interacting in Meaningful Ways, Learning About How English Works, and Using Foundational Literacy Skills. Students enrich their language as they read, write, speak, and listen and as they interact with one another and learn about language. The foundational skills provide access to written language.

#### **Effective Expression**

Each strand of the CA CCSS for ELA/Literacy and each part of the CA ELD Standards includes attention to effective expression. Students learn to examine the author's craft as they read, analyzing how authors use language, text structure, and images to convey information, influence their readers, and evoke responses. Students learn to effectively express themselves as writers, discussion partners, and presenters, and they use digital media and visual displays to enhance their expression. They gain command over the conventions of written and spoken English, and they learn to communicate in ways appropriate for the context and task.

#### **Content Knowledge**

Content knowledge is a powerful contributor to comprehension of text. It also undergirds the ability to write effective opinions/arguments, narratives, and explanatory/informational text; engage in meaningful discussions; and present ideas and information to others. It contributes significantly to language development, and it is fundamental to learning about how English works. Both sets of standards ensure that students can learn from informational texts and can share their knowledge as writers and speakers. An organized independent reading program contributes to knowledge. Content knowledge has a powerful reciprocal relationship with the development of literacy and language.

#### **Foundational Skills**

Acquisition of the foundational skills enables students to independently read and use written language to learn about the world and themselves; experience extraordinary and diverse works of literary fiction and nonfiction; and share their knowledge, ideas, stories, and perspectives with others. Students who know how to decode and develop automaticity with an increasing number of words are best positioned to make significant strides in meaning making, language development, effective expression, and



content knowledge. At the same time, attention to those themes provides the very reason for learning about the alphabetic code and propels progress in the foundational skills.

(See [the Resource Guide to the Foundational Skills at www.cde.ca.gov/ci/rl/cf/documents/foundskillswhitepaper.pdf](http://www.cde.ca.gov/ci/rl/cf/documents/foundskillswhitepaper.pdf).)

### **Parent Notification of Programs**

All parents of English Learners, regardless of proficiency, must be notified at initial enrollment and annually, in writing, of program placement of their children and must also be provided with a description of our program, including educational materials used in this program and their entitlement to request a waiver. The information must be provided in a language the parents understand within 30 days of enrollment.

### **Monitoring of Long Term English Learners**

Long-term English Learners (LTEL) are defined as students who are in grades 6 to 12, have been enrolled in U.S. schools for more than six years, have remained at the same level of English for two or more years as measured by the state's annual proficiency exam, and have scored "standard not met" or "standard nearly met" on the CAASPP ELA assessment.

ELs with little or no English proficiency need more time than native-English speakers to meet grade-level benchmarks in English and state mandated testing targets. Schools must monitor student progress to assure that additional and appropriate learning opportunities are provided in English language development and in reading, writing and other academic content areas in order to close the achievement gap.

Benchmark assessments, course grades, and the CAASPP assessments, along with the number of years a student has been classified as an EL student are used to determine if a student is making the appropriate movement toward becoming RFEP.

If, despite the implementation of school wide interventions and supports, a student is still not making "adequate progress", the school will hold a Student Study Team meeting to discuss the lack of progress. Further evaluation and intervention will be planned by the SST team to support students who are not meeting interim benchmarks. Interventions will be noted and filed on the EL Master Tracking Spreadsheet, in their cumulative folder and/or in a collaborative Google document. Additionally, parents will be notified annually if their student is at risk for becoming a LTEL or has been classified as a LTEL.

### **Meeting the Needs of Long Term English Learners**

*The National Education Association's Publication: Meeting the Unique Needs of Long Term English Language Learners, A Guide for Educators* provides valuable research-based information and best practices to guide schools and LEAs in supporting students at risk for becoming Long Term English Learners (LTEL).

[https://www.rcoe.us/educational-services/files/2012/08/NEA\\_Meeting\\_the\\_Unique\\_Needs\\_of\\_LTELEs.pdf](https://www.rcoe.us/educational-services/files/2012/08/NEA_Meeting_the_Unique_Needs_of_LTELEs.pdf)

Elementary School Strategies and Programs that Prevent the Creation of Long Term English Language Learners:

The trajectory of a Long Term English Language Learner begins in elementary school. Taking the necessary steps early enough can help prevent an entire new generation of long term ELL students. Successful elementary school programs offer high-quality language development programs and strategies that are consistent across grade levels.

- English Language Development/English as a Second Language: Dedicated, daily, and standards-based ELD/ESL programs address the specific needs of students at each fluency level and support instruction with quality materials that focus on all four language domains—with a major emphasis on building a strong oral language foundation; using language for interaction and meaning-making; and developing complex, precise, and academic language.
- Home language development: Programs that develop students' home language (oral and literacy) to threshold levels are a strong foundation for developing English literacy and academic success (at least through third grade, more powerfully through fifth grade, and optimally, ongoing throughout a students' education). Teaching students to read in their first language promotes higher levels of reading achievement in English and provides students the benefits of bilingualism.
- Use curriculum, instruction, and strategies. Use resources that promote transfer between English and the home language.
- Enriched oral language development: Emphasize oral language throughout the curriculum.
- Modified instructional strategies and supplemental materials provide access to academic content.
- Program coherence and consistency: Provide coherence and consistency of program across grades, including, wherever possible, articulation and alignment with preschool.
- High-quality literature: Provide students/LTEs with exposure to high-quality literature and complex and expressive language.

#### *Seven Basic Principles for Meeting the Needs of Middle and High School Long Term English Language Learners*

Seven basic principles lie at the heart of successfully educating middle and high school Long Term English Language Learners:

- Urgency: Focus urgently on accelerating LTEL progress towards attaining English proficiency and closing academic gaps.
- Distinct needs: Recognize that the needs of LTELs are distinct and cannot adequately be addressed within a “struggling reader” paradigm or a generic “English Language Learner” approach, but require an explicit LTEL approach.
- Language, literacy, and academics: Provide LTELs with language development, literacy development, and a program that addresses the academic gaps they have accrued.
- Home language: Affirm the crucial role of home language in a student's life and learning, and provide home language development whenever possible.
- Three R's: rigor, relevance, and relationships: Provide LTELs with rigorous and relevant curriculum and relationships with supportive adults (along with the supports to succeed).
- Integration: End the ESL ghetto, cease the sink-or-swim approach, and provide maximum integration without sacrificing access to LTEL supports.
- Active engagement: Invite, support, and insist that LTELs become active participants in their own education.



## **Instructional Support System**

The Charter School is committed to closing the achievement gap for all students, including English Learners. The Instructional Support System for English Learners is a part of the standards based system of instruction, assessment, monitoring and evaluation provided for all students.

The Instructional Support System for English Learners is designed to provide the mechanisms for recording EL achievement, detecting academic deficits and monitoring the effectiveness of interventions.

To ensure all students will catch up to their grade-level peers, we have the following essential elements:

1. All English Learners are held to the same Charter-adopted curriculum and performance standards in the core curricular areas as all other students.
2. All English Learners participate in a program of curriculum and instruction that is aligned to state content standards, and designed to reduce all language barriers.
  - The English Learner program is designed to assure that participating EL students acquire English and learn grade-level academic content simultaneously and to the greatest extent possible.
  - Components of this program include: ELD, grade-level core curriculum and assessment.
3. The Instructional Support System for English Learners includes an assessment and reporting process of student academic achievement for all students, including English Learners. The use of multiple measures, the disaggregating of student achievement data, and the regular reporting of student achievement data are integral components of the Charter assessment and reporting process and recorded on the EL Master Tracking Spreadsheet.
4. The performance of EL and RFEP students are monitored:
  - Students identified in need of interventions are provided the appropriate intervention aimed at filling in gaps in content knowledge so that ELs can gain full access to grade-level core content instruction in a reasonable period of time.
  - Any areas of deficiency are noted and appropriate modifications in instructional programs or student support systems are identified.

The Instructional Support System described here for ELs is based on five (5) essential elements that include: Adopted curriculum standards; curriculum and instruction aligned with adopted standards; assessment and reporting; charter and site level monitoring and intervention; and program evaluation.

### **1. Adopted Curriculum Standards**

In California Pacific Charter School each English Learner is held to the same charter adopted curriculum standards in the core curricular areas of English Language Arts, math, history-social science and science as every other charter student. In addition, each EL student is expected to demonstrate mastery of the adopted ELD standards.

### **2. Curriculum and Instruction Aligned with Adopted Standards**

California Pacific Charter School supports each English Learner in their appropriate level of language development in the core courses. Each English Learner participates in an instructional program with state adopted materials that are aligned to charter and state standards. Staff

members, through articulation meetings, discuss and interpret data on English Learner students to address the issues surrounding English Learners who may have been in the educational system for some time and seem to be unable to move beyond this level.

### **3. Assessment and Reporting**

California Pacific Charter School administers all state mandated examinations. ELPAC assessments and ongoing multiple measures are used to assess student proficiency. Results are entered onto the EL Master Tracking Spreadsheet for instructional planning and monitoring. Overall student results are shared with the appropriate school staff, school administrators, and governing board.

### **4. Monitoring and Intervention.**

English Learner's assessment results are recorded on the EL Master Tracking Spreadsheet. The results are monitored to evaluate student learning in order to inform instruction and provide interventions as needed. When, according to on-going assessments, students are unable to meet interim expectations in academic content, students shall be referred by teachers and parents to receive academic interventions and support that enable them to overcome any academic deficits before they become irreparable. The intervention itself will directly target the identified academic need. Delivery of the intervention shall be monitored and documented. The effectiveness of the intervention will then be determined based on student work and assessments.

Note: When Special Education students, identified as ELs, are not making adequate progress Special Education teachers must schedule an IEP meeting to discuss further interventions.

### **Staffing Authorizations**

Under the management of the Director of Human Resources, California Pacific Charter School takes an active role in the recruitment and staffing of authorized personnel for all English Learner programs and makes it a priority to hire CLAD or equivalent teachers. Teachers providing instruction in a Mainstream English Program shall be authorized to provide appropriate core content and ELD instruction. This is achieved via a CLAD or equivalent authorization.

Teachers who are not currently authorized, but who are working with English Learners, shall be required to sign a memorandum of understanding stipulating that they will be actively participating in professional development designed to secure an appropriate authorization within two years. The HR Department will then monitor attendance at professional development activities to ensure that such teachers remain on track to complete the necessary training for their authorizations.

### **Professional Development**

California Pacific Charter School provides ongoing professional development opportunities to all teachers and staff working with English Learners. The goal of this training is to help educators acquire specific skills needed to work with English Learners in the areas of ELD instruction, comprehensible core content instruction, program designs, curriculum expectations, and processes and services for English Learners. Training should also focus on multiculturalism and up-to-date research and pedagogy for English Learners to receive equitable and accessible support and opportunities to achieve and reach their goals.

Staff development opportunities include, but are not limited to the following:

- ELD Standards

- ELPAC assessment and identification levels
- ELD strategies and instruction
- SDAIE strategies and instruction
- Differentiated instruction
- EL Master Tracking Spreadsheet and EL Cumulative file training
- Shared Best Practices

To ensure that all staff working with parents of EL students are appropriately trained, training participation and completion is documented.

### **Reclassification**

California Education Code (EC) Section 313 and the California Code of Regulations (5CCR) Section 11308 require that each English Learner who 1) has demonstrated English language proficiency comparable to that of the average native English speaker and 2) who can participate effectively in a curriculum designed for pupils of the same age whose native language is English be Reclassified Fluent English Proficient (RFEP). California Pacific Charter School recognizes the importance and irreversibility of this item and has established the following criteria and process to fully address this obligation.

Once a student has demonstrated that he/she is ready to participate fully in all English instruction without special support services, the student is ready for reclassification.

### **Reclassification Criteria**

California Pacific Charter School uses the following criteria to reclassify EL students to RFEP status:

- Summative ELPAC Overall Score of 4
- Teacher Evaluation
- Parent Approval
- Smarter Balanced and/or Local Assessments can also be used in determining student readiness for reclassification

### **Reclassification Process**

Reclassification is the culmination of an EL student's participation in the program for English Learners and is conducted each year when ELPAC score reports are received by the charter.

Based on the above reclassification criteria, if a student is deemed to qualify for reclassification, a letter will be drafted by the administration. The letter will include all data pertinent to the reclassification. Once the letter has been signed by the administration and the parents of the student, the reclassification will take place. The language acquisition status of the student will be updated in the student information, on the EL Master Tracking Spreadsheet and ultimately in the state reporting system (CALPADS). Additionally, all teachers associated with the student will be informed of the reclassification.

### **Monitoring of Reclassified Students**

The No Child Left Behind Act of 2001, Title III requires that reclassified students be monitored for a period of at least 24 months following reclassification. The school's Lead, teachers, parents, and the assessment Lead supervise the process of monitoring reclassified students. School staff will use the Smarter Balanced assessment, local multiple measure scores, and teacher assessments and observations to semi-annually monitor the progress of RFEP students for a period no less than four (4) years after reclassification. Student performance shall be reviewed at each progress reporting period. Those

students found to be regressing in their academic performance will be referred to receive an academic intervention in the specific area of need. This monitoring of RFEP students is recorded on the EL Master Tracking Spreadsheet.

### **English Learners in Special Education**

In accordance with the ED guidance issued in July 2014, the ED requires that all ELs with disabilities participate in the state's ELP assessment. Federal law requires that all ELs with disabilities participate in the state ELP assessment in the following ways, as determined by the IEP team:

- In the regular state ELP assessment without universal tools, designated supports, and accommodations
- In the regular state ELP assessment with universal tools, designated supports, and accommodations determined by the IEP team or Section 504 team
- In an alternate assessment aligned with the state's ELD standards, if the IEP team determines that the student is unable to participate in the regular ELP assessment with or without universal tools, designated supports, and accommodations

### **Role of the IEP Team**

The IEP team is an essential component in establishing the appropriate academic and functional goals, determining the specifically designed instructional program to meet the unique needs of all ELs with disabilities, and making decisions about how students can participate in the state ELP assessment. In accordance with the new ED guidance, the IEP team is responsible for:

- Making decisions about the content of a student's IEP, including whether a student must take a regular state assessment (in this case, the ELPAC assessment), with or without appropriate universal tools, designated supports and/or accommodations, or an alternate assessment in lieu of the regular ELPAC assessment (ED, July 2014, FAQ #4).
- Developing an IEP for each student with a disability, including each EL with a disability, at an IEP team meeting, which includes school officials and the child's parents/guardians. The Individuals with Disabilities Education Act (IDEA) regulation in Code of Federal Regulations, Title 34, (34 CFR) Section 300.321(a) specifies the participants to be included on each child's IEP team. It is essential that IEP teams for ELs with disabilities include persons with expertise in English language acquisition and other professionals, such as speech-language pathologists, who understand how to differentiate between English proficiency development and a disability (ED, July 2014, FAQ #5).
- Ensuring that ELs' parents or guardians understand and are able to meaningfully participate in IEP team meetings at which the child's participation in the annual state ELP assessment is discussed. If a parent whose primary language is other than English is participating in IEP meetings, the IDEA regulations require each public agency to take whatever action necessary to ensure that the parent understands the proceedings of the IEP team meeting, including arranging for an interpreter (34 CFR Section 300.322[e]). When parents themselves are ELs, Title VI of the Civil Rights Act of 1964 also requires that the LEA effectively communicate with parents in a manner and form they can understand, such as by providing free interpretation and/or translation services (ED, July 2014, FAQ #6).
- Ensuring that all ELs, including those with disabilities, participate in the annual state ELPAC assessment, with or without universal tools, designated supports, and accommodations or take the Alternate ELPAC, if necessary (ESSA Section 1119[b][7] and IDEA Section 612[a][16][A]). An IEP team cannot determine that a particular EL with a disability should not participate in the annual state ELP assessment (ED, July 2014, FAQ #7).

IEP teams will ensure that each English Learner receives appropriate services to develop English proficiency and have equitable access to the full curriculum. Each English Learner's IEP shall include linguistically appropriate goals and objectives based on the student's level of English proficiency and based on the ELD standards. Such goals and objectives will fully address ELD and core content instruction. Each IEP shall also clearly delineate the person(s) and/or programs responsible for providing each instructional service. A parental exception waiver is not required for an English Learner whose IEP indicates that instructional services will be provided through an Alternative Program.

### **SpEd: Assessment**

Students whose initial Home Language Survey indicates that a language other than English is spoken will be assessed on the ELPAC test within the first 30 days of school annually. ELPAC testing is considered to be one of the state's standardized tests; therefore, accommodations/modifications provided in the IEP for any standardized test will apply. SpEd students with an existing EL classification will be assessed annually. If a student is slated to take the ELPAC test, who also would qualify for the CAA, the Special Education Director will be notified so that we can evaluate the need for the Alternate ELPAC.

### **SpEd: Classification**

Students who are classified as English Learners MUST have their ELD needs addressed as part of their Individualized Education Program (IEP). Students who have been reclassified as Fluent English Proficient (RFEP) or who were initially identified as Initially Fluent English Proficient (IFEP) are *not* considered English Learners for the purpose of the IEP. Their progress is still monitored, but ELD does not need to be addressed on the IEP.

### **Needs of English Learners**

The needs of English Learners are addressed in several places on the IEP:

#### **Student Information:**

- Is the student an English Learner?
- What is the student's primary language?
- Proficiency Level and Date: Overall ELPAC proficiency level and scaled score from most recent annual assessment (This information can be obtained from the English Learner/Assessment Lead, the SIS, the EL Master Tracking Spreadsheet or from the English Learner folder that is part of the student's cumulative file)
- Is an interpreter required? (*for the parents*) Indicate the language for the interpreter.

#### **Present Levels:**

- Most recent ELPAC scores should be listed for each domain area (list performance level as well as scaled score)
- *Academic Skills:* In addition to the academic data usually included, it should be indicated how the student's English language development needs, if any, will be addressed in each academic area. For each area on the ELPAC that falls below level 3, the student's IEP must have a goal written to address that area (i.e. listening, speaking, reading, and/or writing).
- *Communication:* Information on the student's language development should be specified in this section of the IEP, including the student's primary language and how the student's language development (expressive and receptive) relates to their ability to communicate with others and its impact on their school performance.

**Special Factors:**

- Testing Accommodations/Modifications: If the student needs the same accommodations or modifications as are being used on the CAASPP tests, the box next to “Other statewide/charter assessments” will be checked and “Same as Above” for the listed accommodation/modification will be written.

**Annual Goals:**

- Each English Learner’s IEP shall include linguistically appropriate goals and objectives based on the student’s level of English proficiency and based on the ELD standards. Such goals and objectives will fully address ELD and core content instruction. Each IEP shall also clearly delineate the person(s) and/or programs responsible for providing each instructional service.
- For each area on the ELPAC that falls below level 3, the student’s IEP must have a goal written to address that area (i.e. listening, speaking, reading, and/or writing).
- Ensure that goals are linguistically appropriate (see below)

**Services:**

- If the student requires any supplemental aids or services or any special education services to enable the student to benefit from their ELD services or setting, they will be listed in the IEP. If the IEP team determines that the student’s program should be modified from that of other ELD students in order to meet the student’s unique educational needs, that modification should be listed in the IEP.

**Writing Linguistically Appropriate Goals and Benchmarks-**

- Based on the most recent ELPAC results and other information on the Present Levels page, identify the “Areas of Need” that the IEP goals will address in listening, speaking, reading and writing.
- In the *Baseline* section, describe what the student is currently able to do in the skill area of need and indicate the ELPAC proficiency level in parenthesis.
  - For example: Area of Need: Writing, *Baseline*: Student is able to write simple sentences with some errors in grammar and syntax (ELPAC Writing - Level 1)
- Write (or modify from a goal bank selection) an annual goal to ensure that it is linguistically appropriate and includes the words “in English.”
  - For example: By (*date*), following teacher-led prewriting activities, (*student name*) will compose a single paragraph in English including a topic sentence, three supporting sentences and a concluding paragraph with \_\_\_% accuracy in \_\_\_ of \_\_\_ trials as measured by student work samples.

*Note: It is best practice to insert the phrase “in English” to emphasize the language component of the goal.*

Check the “Linguistically Appropriate” box to indicate the goal is linguistically appropriate to meet the student’s English language development needs.

**Special Education EL Reclassification**

In some cases, an IEP team may find that it is the disability that interferes with a student’s ability to demonstrate English fluency due to Communication Disorders and/or Cognitive Disabilities. In these cases, the IEP team assesses student progress and considers reclassification of the student to RFEF status. Ideally, this should be done as early as possible; as soon as one to two summative test



administrations, or as soon as there is reasonable evidence that it is a student's disability that is prohibiting English Language Acquisition.

The Administrative Designee and/or Case Manager should include the rationale for reclassification.

**Avoid:**

- Focusing on family history. Instead, focus on assessment results and the impact of the disability.
- Including parents' wishes for reclassification or opinion as to the validity of ELPAC scores or current English learner status. Instead, focus on the needs of the child.
- Basing recommendation for changing EL status on the belief of the parent(s) or team members that the EL status or Home Language Survey was erroneous to begin with and therefore the student should never have been classified as EL. This is a matter outside of the scope of the IEP team and cannot be the basis for the team's recommendation for reclassification.

If the recommendation for reclassification is taking place as part of the student's initial IEP or annual review, then all other pages of the IEP are completed to reflect the recommendation that the student is to be reclassified as RFEP (Reclassified Fluent English Proficient). If the recommendation for reclassification is taking place between annual reviews, then in addition to completing the *IEP Team Recommendation for Reclassification of Special Education English Learners* form, an *IEP Amendment* meeting and form must also be completed. All applicable staff should be a part of the reclassification meeting. If the team decides to reclassify the student as RFEP, the Special Education teacher or Case Manager will include a copy of the *IEP Team Recommendation for Reclassification of Special Education English Learners* form in the EL file, will update the EL Master Tracking Spreadsheet and follow all other reclassification procedures. These procedures include notifying the assessment and accountability department of the reclassification. Because this is an IEP team recommendation, the parents must be part of the decision. If the reclassification is not agreed upon, the IEP team must ensure that the IEP continues to address the needs of the student who remains classified as an English learning student.

**Parent Advisory Committees**

An English Learner Advisory Committee (ELAC) is a school-level committee composed of parents, staff, and community members designated to advise school officials on English learner programs and services and is required for any California public school with 21 or more English Learners. The ELAC shall be responsible for the following tasks:

- Advising the principal and staff in the development of a site plan for English learners and submitting the plan to the School Site Council for consideration of inclusion in the School Plan for Student Achievement.
- Assisting in the development of the schoolwide needs assessment.
- Ways to make parents aware of the importance of regular school attendance.
- Each ELAC shall have the opportunity to elect at least one member to the District English Learner Advisory Committee (DELAC). Districts with 31 or more ELACs may use a system of proportional or regional representation.

Parents or guardians of English Learners shall constitute at least the same percentage of the ELAC membership as their children represent the student body and the parents or guardians of English Learners shall elect the parent members of ELAC. Parents or guardians of English Learners shall be provided the opportunity to vote in the election.

ELAC members shall receive training materials and training which will assist them in carrying out their required advisory responsibilities. Training shall be planned in full consultation with committee members, and funds from appropriate resources may be used to meet the costs of providing the training to include costs associated with the attendance of members at training sessions. ELAC meeting agendas will be posted on the school website.

#### Legal References

- California Education Code, sections 35147, 52176(b) and (c), 62002.5, and 64001(a)
- California Code of Regulations, Title 5, Section 11308

The goal of the Parent Advisory Committee is to promote positive collaboration between parents and the California Pacific Charter School:

- Includes parents and community members in the decision-making, planning and evaluation of English Learner Master Plan.
- Develop a working partnership between parents and the schools to provide equal access to education for all students.
- Promote open communication with parents and community members

#### **Accountability and Evaluation**

California has been working for the past several years to improve education at the state level. The goal is to increase the academic achievement of all students by creating a coordinated system through the use of content and performance standards. In response to statewide accountability reform, California Pacific Charter School provides clearly-defined standards and expectations for student learning and has a primary goal that all students will meet the charter's academic content and performance standards.

Through the California Pacific Charter School assessment program, the assessment and accountability department carefully considers what students are asked to do, how student performance is evaluated and how evaluation results are used. The assessment program is responsive to the developmental differences, linguistic differences, and special needs of English Learners. Through multiple forms of assessment, California Pacific Charter School is able to determine to what degree English Learners are achieving English proficiency and meeting academic achievement goals.

California Pacific Charter School's assessment practices with respect to English Learners are designed to:

- Assess and monitor language development by time in program
- Assess academic achievement in meeting grade level core standards
- Assess progress of ELs achieving ELD grade level standards
- Ensure learning opportunities in reading and writing are provided
- Monitor that targeted interventions are working

Assessment data is compiled, analyzed and reported by California Pacific Charter School leads and Data and Assessment Department. Their reports are then analyzed by the Superintendent and Director of School Operations to produce a set of suggested program modifications which are then shared with the local Board of Directors, teachers, EL coordinators, and EL parents for additional input and approval.



California Pacific Charter School annually determines the number and percentage of EL students who have become RFEP through ongoing uploads of information to CALPADS. CALPADS reports the actual count of EL, IFEP, and RFEP students during the calendar year as well as the number of teachers providing and authorized to provide appropriate instruction for English Learners.

## **School - Parent/Guardian Compact**

The Charter school distributes to parents/guardians and family members of Title I, Part A students a school-parent/guardian compact (Compact). This Compact, which has been jointly developed with parents/guardians, outlines how parents/guardians, the entire school staff, and students will share the responsibility for improved student academic achievement. This Compact describes specific ways the school and families will partner to help children achieve the state's high academic standards. This Compact addresses the following legally required items, as well as other items suggested by parents/guardians and family members of Title I, Part A students:

1. The Charter school's responsibility is to provide high-quality curriculum and instruction (ESSA Section 1116[d][1])
2. The ways parents/guardians and family members will be responsible for supporting their child's learning (ESSA Section 1116[d][1])
3. The importance of ongoing communication between parents/guardians, family members, and teachers through, at a minimum, monthly learning period meetings, frequent reports on student progress, and access to staff (ESSA Section 1116[d][2])
4. Parent/Guardian-teacher discussion, at least annually, during which the Compact shall be discussed as it relates to the individual child's achievement (ESSA Section 1116[d][2][A])
5. Frequent reports to parents/guardians and family members on their child's progress (ESSA Section 1116[d][2][B])
6. Reasonable access to staff and opportunities for parents/guardians and family members to participate in their child's education (ESSA Section 1116[d][2][C])

How does the school address this?

1. The school will provide high-quality curriculum and instruction as outlined in the school's charter.
2. Parent/Guardian, student, and teacher sign the school's master agreement outlining course of study and performance expectations.
3. Communication and access to the staff are conducted and available through weekly check in meetings/communication, school email communication, conferences, learning period meetings, and school social media outlets.
4. Title I Family and Parent/Guardian Engagement Policy and the School-Parent/Guardian Compact will be discussed annually.
5. Student progress is emailed weekly and discussed at each meeting with the homeroom teacher. Report cards are provided each semester to all students. Progress reports are

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*Revised: August 2023*

*School Site Council Approved: October 28, 2020, Reviewed: 5/25/2022*

*Board Approved: November 12, 2020*

provided after the 1st quarter and 3rd quarter for all students, and parent-teacher conferences held (as-needed).

6. Given the model of the school, the parents/guardians are highly active participants in their child's education. Parents have access to student progress at all times through the Parent Portal.
7. Parents/guardians have access to staff via email, phone, text during normal office hours, and may request a parent conference at any time.

The Charter school engages Title I, Part A parents/guardians and family members to improve the achievement of their child through meaningful interactions with the school. This Compact supports a partnership among staff, parents/guardians and family members, and the community to improve student academic achievement. To help reach these goals, the school has established the following practices:

1. In which ways does the school provide Title I, Part A parents/guardians and family members with assistance in understanding the state's academic content standards, assessments, and how to monitor and improve the achievement of their child (ESSA Section 1116[e][1])?
  - a. Through homeroom meetings, parent-teacher conferences, and learning period meetings with the teacher of record
  - b. Review of local and state assessments and performance score
  - c. The school's MTSS program that provides support for students that are struggling academically
  - d. Through six week progress check ins with the student support team for students identified for Level 3 intervention
2. In which ways does the school provide Title I, Part A parents/guardians and family members with materials and training to help them improve the achievement of their child (ESSA Section 1116[e][2])?
  - a. Parent/guardian training and webinars
  - b. Parent/guardian resources found on the CalPac website
3. With the assistance of Title I, Part A parents/guardians and family members, in which ways does the school educate staff members on the value of parent/guardian and family member contributions and how to work with these members as equal partners (ESSA Section 1116[e][3])?
  - a. Teacher professional development
  - b. Teacher resources found in the school's teacher professional development repository
4. In which ways does the school coordinate and integrate the Title I, Part A parent/guardian involvement program with other programs and conduct other activities, such as resource

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*Revised: August 2023*

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- centers, to encourage and support parents/guardians and family members in more fully participating in the education of their child (ESSA Section 1116[e][4])?
- a. The school will provide Title I goals and action items via SPSA and/or LCAP
  - b. The school will provide parent/guardian and student outreach events, such as STEM and Makerspace event days, field trips, grade level Connection Clubs, Art Events, Science Fair, and the Talent Show
5. In which ways does the school distribute information related to school and parent programs, meetings, and other activities to Title I, Part A parents and family members in a format and language that the parents and family members can understand (ESSA Section 1116[e][5])?
- a. Information will be presented in a digital format that can be translated with the use of technology
  - b. Information will be presented in a way that is understandable to parents
  - c. Information will be presented visually and verbally, as applicable
6. In which ways does the school provide support for parent and family member involvement activities requested by Title I, Part A (ESSA Section 1116[e][14])?
- a. Given the model of the school, the parents are highly active participants in their child's education
  - b. The school will provide parent/guardian and student outreach events, such as STEM and Makerspace event days, field trips, grade level Connection Clubs, Art Events, Science Fair, and the Talent Show
7. The school provides opportunities for the participation of all Title I, Part A parents and family members, including those with limited English proficiency, disabilities, and migratory students. In which ways are the information and school reports provided in a format and language that parents and family members can understand (ESSA Section 1116[f])?
- a. A digital format that can be translated with the use of technology
  - b. Information is presented in a way that is understandable by parents
  - c. Information is presented visually and verbally, as applicable
  - d. Information is translated verbally, as applicable

This Compact was adopted by California Pacific Charter Schools for the 2023-2024 school year and will be in effect for the period of the 2023-2024 school year.

The school will distribute the Compact to all parents and family members of students participating in the Title I, Part A program as part of the school's annual notices.

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*Revised: August 2023*

*School Site Council Approved: October 28, 2020, Reviewed: 5/25/2022*

*Board Approved: November 12, 2020*

# Coversheet

## Consent - Personnel Services

**Section:** X. Consent  
**Item:** C. Consent - Personnel Services  
**Purpose:**  
**Submitted by:**  
**Related Material:** CalPac Office Clerk Board Revised August 2023.pdf  
Director Fiscal Services Board Revised August 2023.pdf  
BUS Employee Handbook Revisions August 2023.docx.pdf  
2023 Employee Handbook Revisions 8.2023.docx (1).pdf  
DRAFT Employee Handbook AUGUST 2023.docx (1).pdf  
BUS Arbitration Agreement August 2023.docx.pdf  
Draft Arbitration Agreement Cal Pacs 4865-7905-2637 v.5.docx.pdf



# California Pacific Charter Schools

## Office Clerk *Job Description*

<b>Reports To:</b>	Executive Director of designee
<b>FLSA Status:</b>	Non-Exempt
<b>School Classification:</b>	Classified
<b>Pay Range:</b>	Grade 1
<b>Work Schedule:</b>	12 months
<b>Location:</b>	Onsite Office

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**Position Summary:** *The Office Clerk performs a variety of clerical support duties requiring an understanding of the school's operations, procedures and functions; assists in assuring smooth and efficient office operations.*

### Minimum Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

- Related clerical experience including data entry/typing, recordkeeping, and customer service.
- Graduation from high school or equivalent, preferably supplemented by college level coursework to support office management and business related duties.
- Hold and maintain a valid California Driver's License; proof of automobile insurance; and full time use of a dependable automobile that is insured pursuant to California regulations.
- State and federal background clearance (LiveScan) to work with students (Education Code Section 44237). No prospective employee can report to work without this clearance being received and Human Resources notifying the immediate supervisor of this clearance.
- Proof of a clear TB test dated within the last 60 days (Education Code Section 49406) upon employment and thereafter updated every four years.

### General Skills

- Team player
- Love of learning – a lifelong learner
- Flexible and adaptable
- Open to differing views and objectives
- Conflict resolution skills
- Uphold the School's vision and mission by acting with integrity

### Essential Duties and Responsibilities

*Office Clerk Job Description  
Board Approved: April 2020*

1. Perform a variety of clerical support duties requiring an understanding of the school operations, procedures and functions of an office; assist in assuring smooth and efficient office operations.
2. Serve as receptionist and answer telephones; take and relay messages as appropriate; direct calls to appropriate personnel; greet and assist visitors; respond to inquiries and explain school and District policies and procedures.
3. Maintain various office and departmental records and files such as student cumulative records; sort and file materials according to established procedures.
4. Input a wide variety of information into an assigned computerized database and generate a variety of reports and lists; request or provide information as necessary to assure completeness and accuracy.
5. Communicate with other departments, District staff and outside organizations regarding office operations, activities, policies and procedures and student information; prepare and coordinate schedules and calendars as directed including site facilities use, noon duty staff and parent volunteers.
6. Participate in student registration activities as assigned by the position; assist parents with proper completion of forms; enroll and drop students as appropriate; assure emergency cards are completed and up-to-date; enter student information into a computerized student information system.
7. Operate a variety of office equipment including a copier, fax machine, calculator, typewriter and a computer; arrange for repairs of equipment as directed.
8. Follow policies and procedures that ensure that student record data is entered, processed, and stored in accordance with school guidelines.

#### **Other Duties**

- Document and report to the school's management all formal disciplinary actions involving students; supporting management with addressing and resolving complaints from students and parents in a timely manner; ensuring compliance with the provisions of California Penal Code Section 11166 (Child Abuse and Neglect Reporting Act).
- Respond to all school related written correspondence, phone calls, voicemails, and emails within 24 business hours.
- Perform other duties as assigned.

#### **Knowledge and Abilities**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Knowledge of

*Office Clerk Job Description  
Board Approved: August 2023*

- The school's organization, operations, policies and objectives.
- Applicable laws, codes, rules and regulations.
- Functions and operations of an office.
- Recordkeeping techniques and file management
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- Interpersonal skills using tact, patience and courtesy.
- Oral and written communication skills.
- Operation of a computer and assigned software.
- Methods of collecting and organizing data and information.
- Customer service and public relations techniques.

#### Ability to

- Understand and resolve issues, complaints or problems.
- Compose correspondence and written materials independently or from oral instructions.
- Assure efficient and timely completion of office and departmental projects and activities.
- Establish and maintain cooperative and effective working relationships with others.
- Type or input data at an acceptable rate of speed.
- Operate a variety of office equipment including a computer and assigned software.
- Maintain electronic and hard copy records.
- Maintain confidentiality of privileged and sensitive information.
- Plan and organize work.
- Complete work with many interruptions.
- Compile and verify data, keep logs, and prepare reports.
- Communicate effectively both orally and in writing.
- Participate as a positive team member for the purpose of enhancing and sharing knowledge and skills for the delivery of best practices.

#### **Use of Computer Technology**

To perform this job successfully, an individual must be proficient utilizing assigned software, Microsoft Office applications, and a variety of web-based applications; have the ability to utilize the Internet to conduct research and participate in virtual meetings; and respond to a high volume of emails and requests in a timely manner.

#### **Physical Demands**

*Office Clerk Job Description  
Board Approved: August 2023*



The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Hearing and speaking to exchange information
- Dexterity of hands and fingers to demonstrate activities
- Operate a computer and other office productivity machinery
- Seeing to read a variety of materials and view computer monitor for extended periods of time
- Close vision and ability to adjust focus
- Bending at the waist, kneeling, or crouching
- Sitting or standing for extended periods of time
- Lifting objects up to 25 pounds with or without assistance

### **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Noise level is generally moderate
- Meetings conducted in office settings
- Indoor varying in temperature
- Employee must have available transportation and when required, be able to drive up to 100 miles in a day

### **Hazards**

- Contact with dissatisfied individuals.

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### **Employee Acknowledgement**

The job description is not intended to be an all-inclusive list of duties and standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as assigned by their supervisor.

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Employee Signature

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Printed Name

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Date

*Office Clerk Job Description  
Board Approved: August 2023*



## Director of Fiscal Services

### *Job Description*

<b>Reports To:</b>	Superintendent/CEO
<b>FLSA Status:</b>	Exempt
<b>School Classification:</b>	Classified Management
<b>Pay Range:</b>	Classified Administrative Salary Schedule - Director
<b>Work Schedule:</b>	12 months
<b>Location:</b>	Remote Office

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#### **Position Summary:**

*The Director of Fiscal Services is responsible to assist the Superintendent in: the execution of the fiscal services of the organization with specific responsibility for the oversight of all budgeting, accounting, financial reporting, and compliance activities; the preparation and oversight of audits for the charter schools; the management of assets and resources; supervision and evaluation of assigned staff; and the implementation and integration of financial systems to enhance and improve organizational effectiveness.*

#### **Minimum Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

- Bachelor's Degree in Accounting, Finance or related field is required. CPA or MBA is Preferred.
- Three years of responsible experience in finance or accounting, including three years in a supervisory or lead capacity in a public school system or in a position performing related duties.
- Three to five years of experience leading the accounting and/or fiscal reporting duties with a charter school organization in a management capacity is highly desirable.
- Experience working in an organization that independently reports fiscal information is desirable.
- Hold and maintain a valid California Driver's License; proof of automobile insurance; and full time use of a dependable automobile that is insured pursuant to California regulations.
- State and federal background clearance (LiveScan) to work with students (Education Code Section 44237). No prospective employee can report to work without this clearance being received and Human Resources notifying the immediate supervisor of this clearance
- Proof of a clear TB test dated within the last 60 days (Education Code Section 49406) upon employment and thereafter updated every four years.

#### **General Skills**

- Team player

*Director Fiscal Services Job Description*  
*Board Approved: August 13, 2023*

- Love of learning – a lifelong learner
- Flexible and adaptable
- Open to differing views and objectives
- Conflict resolution skills
- Uphold the School's vision and mission by acting with integrity

## **ESSENTIAL FUNCTIONS and RESPONSIBILITIES:**

1. Administers all fiscal affairs of California Pacific Charter Schools including accounting and budgeting functions as required by the California Education Code and the policies and regulations of the Board of Directors.
2. Develops financial information and proposals to assist the Superintendent in administering those areas of business operations relating to wages, benefits, retirement and leaves; cash management, bank reconciliations, accounts payable, accounts receivable, grant accounting, and internal/external reporting.
3. Coordinates the development of the annual budgets; monitors departmental and project budgets to provide assistance and ensure compliance with State guidelines and laws.
4. In coordination with the leadership team, aligns the annual budget with the Local Control Accountability Plan (LCAP).
5. Prepares, plans and manages the fiscal year-end closing process to assure validity and accuracy of the organization's financial data for subsequent preparation of financial statements.
6. Oversees completion of regular reconciliation of all funds, including all balance sheets and income statement accounts.
7. Designs procedures and internal controls to safeguard the funds, assets, and resources of the organization; ensures proper implementation and provides training accordingly.
8. Advises administrators of budget account balances; resolves problems and discrepancies; and makes revisions as necessary, in compliance with established policies and procedures.
9. Prepares and submits a variety of compliance reports to all stakeholders including authorizing school districts, county offices, CDE and SELPA within mandatory timelines.
10. As applicable, coordinates financial and governmental audits, which include work paper preparation, liaison with auditors and staff with an understanding of programmatic and financial requirements of governmental programs.
11. Reviews and analyzes financial data; reports on findings; oversees accounts payable, accounts receivable, cash management, State ADA reconciliation, purchasing and other related financial reporting functions.
12. Reviews and approves accounts payable batches in accordance with the organizations policies and procedures.
13. Oversees all accounts, ledgers, and reporting systems ensuring accuracy and full compliance with appropriate GAAP standards, industry best practices and regulatory requirements.

*Director Fiscal Services Job Description*  
Board Approval: ~~ed June 13, 2023~~ August 2023

14. Responsible for review of payroll data, including review for any discrepancies, errors, or inconsistencies in the payroll data; responsible for approving payroll to proceed with payment processing.
15. Audits financial documents for completeness, accuracy, and compliance with policies and procedures.
16. Attends meetings of the Board of Directors to present financial reports, budget data, attendance reports, enrollment projections and other related matters as may be requested by the Superintendent; recommends board policies as necessary to carry out the business functions of the organization.
17. Conceptualizes and articulates strategies to improve financial operations and services.
18. Serves as a liaison with the charter school authorizers, management, and staff to coordinate accounting and reporting processes; develops project timelines and a fiscal services calendar to ensure all deadlines are met.
19. Interviews, selects, supervises, evaluates, disciplines and provides direction to assigned finance staff; mentors, guides and trains assigned staff to ensure compliance with accounting standards, to ensure customer service goals are achieved and that leadership and teamwork are developed and practiced.
20. Develops and maintains effective communication systems and processes.
21. Represents the interests of the organization in a variety of settings and coordinates with the outside agencies relative to business functions, the financial, personnel and student information systems and such other matters as may be requested by the Superintendent; promotes California Pacific Charter Schools in the community through positive public relations and interacts effectively with media.
22. Attends a variety of meetings to maintain current knowledge of legislation, legal codes and requirements; reviews changes in charter school finance; attends workshops and meetings with authorizing districts, county offices of education, and other state agencies; attends and/or conducts staff meetings, in-service activities, workshops, conferences and other training.
23. Provides optimal internal communications for staff at all levels throughout the organization; creates and promotes a positive and supportive work environment.
24. Actively seeks to improve and simplify accounting and fiscal management approach with sustainable and scalable solutions. This includes the use of technology to eliminate inefficiencies while maintaining high accuracy.
25. Keeps informed on trends and changes in legislation applicable to charter school finance and budgeting; makes recommendations for changes.

**Other Duties:**

- Attends all staff and professional development meetings.
- Maintains confidentiality
- Responds to all school related written correspondence, phone calls, voicemails, and emails within 24 business hours.

*Director Fiscal Services Job Description*  
Board Approval: ~~ed June 13, 2023~~ August 2023

- Documents and reports to the school's management all formal disciplinary actions involving students; supporting management with addressing and resolving complaints from students and parents in a timely manner; ensuring compliance with the provisions of California Penal Code Section 11166 (Child Abuse and Neglect Reporting Act).
- Performs other related duties as assigned.

### **Knowledge and Abilities**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

#### **Knowledge of**

- Applicable sections of the California Education Code, Charter school law and other pertinent laws and regulations
- Planning, organization, and direction of the fiscal services of charter schools
- Generally Accepted Accounting Principles and Procedures, school accounting policies, and governmental fund accounting procedures
- Accounting, bookkeeping and financial recordkeeping principles and procedures related to school accounting
- Budget preparation and control
- Oral and written communication skills
- Principles and practices of administration, supervision, and training
- Effective communication presentation techniques to provide key data to various stakeholder groups
- Administering and improving the use of enterprise accounting software
- Proficient with Spreadsheets, Database, Word Processing Softwares

#### **Abilities:**

- Plan, organize and administer the fiscal services functions of the organization
- Reason, forecast and project with accuracy
- Make presentations to stakeholders including staff, parents, authorizing districts, and the Board
- Effectively communicate the complexities of school finance in an understandable manner throughout the school community
- Apply and adapt sound accounting and auditing methods to a variety of financial transactions and problems
- Analyze, interpret and prepare financial statements and reports
- Establish and maintain fiscal strategies that will ensure that the Charter School budget is aligned with Charter School goals and remains fiscally sound
- Organize, coordinate, and effectively supervise and evaluate the work of others

- Create and implement procedures, track processes assign work in order to meet established timelines
- Demonstrate sensitivity to individual differences and cultural backgrounds
- Think strategically while having the skills to handle day-to-day details and problems
- Use logical, systematic thinking while managing multiple priorities in a fast-paced environment and subject to frequent interruptions
- Work efficiently with diplomacy both individually and as part of a management team

### **Use of Computer Technology**

To perform this job successfully, an individual must have knowledge of: database software, how to use the Internet to find information and complete tasks, email usage, order processing systems, spreadsheet software, and word processing software.

### **Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Hearing and speaking to exchange information
- Dexterity of hands and fingers to demonstrate activities
- Operates a computer and other office productivity machinery
- Seeing to read a variety of materials and monitor students
- Bending at the waist, kneeling or crouching
- Sitting or standing for extended periods of time
- Lifting objects up to 25 pounds
- Close vision and ability to adjust focus

### **Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Noise level is generally moderate
- Meetings conducted in public and private settings
- Indoor and outdoor in varying temperature
- Employee must have available transportation and be able to drive up to 200 miles in a day

### **Hazards**

- Contact with dissatisfied individuals

**Employee Acknowledgement**

The above job description is not intended to be an all-inclusive list of duties and standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as assigned by their supervisor.

\_\_\_\_\_  
Employee Signature                      Printed Name                      Date

**CALIFORNIA PACIFIC CHARTER SCHOOLS**

**Agenda Item:**

**Date:** August 8, 2023

	Correspondence/Proposals/Reports
X	Consent Agenda
	Business/Financial Services
	Education/Student Services
X	Personnel Services
	Curriculum
	Policy Development

**Item Requires Board Action:** \_\_\_\_\_ **Item is for Information Only:** \_\_\_\_\_

**Item:** Approve revisions to the Employee Handbook

**Background:**

Each year staff review changes in employment law and best practices in human resources in order to ensure the Employee Handbook and board policies are in compliance. Following review and approval from the Board of Directors, the revisions to the Handbook will be provided to each employee electronically through the internal human resources information system. The proposed changes to the Employee Handbook have been outlined in a revisions summary document for reference.

It is recommended the Board approve the revisions to the Employee Handbook and direct staff to provide the revisions to all employees for acknowledgement.

**Fiscal Impact:**

None



## CALIFORNIA PACIFIC CHARTER SCHOOLS - EMPLOYEE HANDBOOK REVISIONS AUGUST 8, 2023

Bold/Italics to indicate new text

Strikethrough to reflect text being removed

Location	Item
<p>Welcome to CalPac!</p>	<p>Revise:                      We are glad to have you on our team! You have joined an organization that focuses on the execution of high quality personalized learning <del>models that allow a flexible environment</del> using innovative delivery methods and technology to foster empowered, life-long learners. As an organization we seek to hire and retain high caliber individuals to meet our vision of extraordinary education.</p> <p><b><i>The School complies with all federal and state employment laws, and this handbook generally reflects those laws. The School also complies with any applicable local laws, although there may not be an express written policy regarding those laws contained in the handbook.</i></b></p> <p><b><i>The employment policies and/or benefits summaries in this handbook are written for all employees. Please take the time now to read this handbook carefully and sign the acknowledgement to show that you have read, understand, and agree to the contents of this handbook, which sets out the basic rules and guidelines concerning your employment. This handbook supersedes any previously issued handbooks or policy statements dealing with the subjects discussed herein. The School reserves the right to interpret, modify, or supplement the provisions of this handbook at any time. Neither this handbook nor any other communication by a management representative or other, whether oral or written, is intended in any way to create a contract of employment. Please understand that no employee handbook can address every situation in the workplace.</i></b></p> <p><del>Our Mission: CalPac’s mission is to support and encourage all students to relentlessly pursue their life goals by providing an accessible, inclusive, and personalized learning community.</del></p> <p><del>Our Vision: California Pacific Charter Schools, in partnership with our community, will:                      Nurture — Foster an enriching school environment to nurture individuals academically, socially,</del></p>

~~and emotionally, so they are equipped to tackle academic challenges and become productive, responsible, ethical, creative, and compassionate members of society.~~

~~Build – Forge strong, positive connections with students so they can build confidence, achieve independence, meet current and future challenges, and develop social awareness, civic responsibility, and personal growth.~~

~~Grow – Provide our graduates with a foundation that will enable them to be college and career prepared to succeed in their post-secondary endeavors.~~

~~Our Core Values: CalPac CARES~~

~~Community, Accessible, Rigorous, Engaging, and Supportive~~

We truly value our employees and have developed this handbook to assist you with understanding our policies, procedures, and performance expectations. Keep in mind that the employee is responsible for reading and understanding the handbook as well as any posted revisions; however, if anything is unclear to you, please discuss the matter with your supervisor or Human Resources (HR). As a team member we want you to have a long and successful career with us - where you can make an impact on student education. We sincerely hope that you will find your employment here to be one of enrichment, collaboration, and an overall professionally rewarding experience. ***If you have questions about your employment or any provisions in this handbook contact Human Resources.***

***We wish you success in your employment here at California Pacific Charter Schools! Best wishes for a wonderful school year.***

***Sincerely,***

***Christine Feher, Superintendent***

~~CalPac The Leadership Team~~

<p><b>About CalPac</b></p>	<p><b><i>About CalPac</i></b> (move content from the Welcome Section)</p> <p><b><i>Our Mission: CalPac’s mission is to support and encourage all students to relentlessly pursue their life goals by providing an accessible, inclusive, and personalized learning community.</i></b></p> <p><b><i>Our Vision: California Pacific Charter Schools, in partnership with our community, will:</i></b></p> <p style="padding-left: 40px;"><b><i>Nurture - Foster an enriching school environment to nurture individuals academically, socially, and emotionally, so they are equipped to tackle academic challenges and become productive, responsible, ethical, creative, and compassionate members of society.</i></b></p> <p style="padding-left: 40px;"><b><i>Build - Forge strong, positive connections with students so they can build confidence, achieve independence, meet current and future challenges, and develop social awareness, civic responsibility, and personal growth.</i></b></p> <p style="padding-left: 40px;"><b><i>Grow - Provide our graduates with a foundation that will enable them to be college and career prepared to succeed in their post-secondary endeavors.</i></b></p> <p><b><i>Our Core Values: CalPac CARES</i></b>  <b><i>Community, Accessible, Rigorous, Engaging, and Supportive</i></b></p>
<p>Section I, A. Equal Employment Opportunity</p>	<p>Revise: The School is an equal opportunity employer and makes employment decisions on the basis of merit. Selections for employment focus on the candidates whose training and experience most closely align with the position requirements, and fit with the School’s mission, vision, and values. <del>School policy prohibits unlawful discrimination based on actual or perceived race (including traits historically associated with race, including, but not limited to, hair texture and protective hairstyles such as braids, locks and twists), color, creed, actual or perceived gender (including gender identity and gender expression), religion (all aspects of religious beliefs, observance or practice, including religious dress or grooming practices), marital status, registered domestic partner status, status as a victim of domestic violence, reproductive health decision making, assault or stalking, age (40 and over), ethnicity, national origin or ancestry (including language use restrictions),</del></p>

	<p><del>citizenship, physical, intellectual or mental disability (including HIV and AIDS), medical condition (including cancer or a record or history of cancer, and genetic characteristics), family or medical leave status, sex (including pregnancy, childbirth, breastfeeding or a related medical condition), genetic information, sexual orientation, political affiliation, military and veteran status or any other consideration made unlawful by federal, state, or local laws. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.</del></p> <p>(This policy statement is revised in alignment with the State of California.)  <b><i>California Pacific Charter Schools (CPCS) is committed to promoting a discrimination-free and harassment-free educational and work environment. CPCS prohibits discrimination and harassment regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation. CPCS also ensures equal opportunities for education and prohibits retaliation for reporting any violation of this policy. Additionally, reporting, or assisting in reporting, suspected violations of this policy and cooperating in investigations or proceedings arising out of a violation of this policy are protected activities under this policy.</i></b></p>
<p>Section I, D. Diversity Policy</p>	<p>Remove due to redundancy.</p>
<p>Section III, G. Punctuality and Attendance</p>	<p>Revise: Employee punctuality and consistent attendance contributes to the positive operations of the School. As such, attendance and punctuality are performance expectations and are measured on the overall job performance. Employee tardiness or chronic absenteeism causes unnecessary problems for students and fellow employees. While an employee is absent, other employees may be burdened with performing additional duties in order to maintain operations. Further, employees are expected to report to the workplace and be prepared to begin work at their scheduled reporting times. To avoid conflict with the daily operations of the School, employees should schedule personal affairs outside of regular working hours. <b><i>Employees who work remotely are required to ensure a stable internet connection and participation in school duties free from personal or environmental distractions.</i></b></p>

<p>Section IV, B. Employee Status</p>	<p><b>B. Employee Status</b></p> <p><del>Employees may include exempt, nonexempt, regular full-time, regular part-time, and seasonal persons employed with the School who are subject to the control and direction of the School in the performance of their duties.</del></p> <p><b><i>The School designates all employees as either exempt or nonexempt in compliance with applicable federal, state, and local law:</i></b></p> <ul style="list-style-type: none"> <li>● Exempt: Employees whose positions meet specific criteria established by the Fair Labor Standards Act (FLSA) and who are exempt from overtime pay requirements.</li> <li>● Nonexempt: Employees whose positions do not meet FLSA criteria and who are paid one and one-half their regular rate of pay for hours worked in excess of 40 hours per week. Nonexempt employees are also subject to meal period and rest break regulations.</li> </ul> <p><b><i>The School also assigns each employee to one of the following categories:</i></b></p> <ul style="list-style-type: none"> <li>● Regular Full-time: Employees who are regularly scheduled to work 30 or more hours per week. Generally, full time employees are eligible for the School benefit package, subject to the terms, conditions, and limitations of each benefit program. Full-time status will be evaluated on a monthly basis.</li> <li>● <b><i>Regular Part-Time Employees (Tier 1). Regular part-time employees are normally scheduled to work 24 -31.9 hours per workweek. Part-time employees are eligible for benefits as outlined in the handbook.</i></b></li> <li>● <b><i>Non-Regular Employees. (Hourly/Temporary/Seasonal) Hourly employees work less than 24 hours per week. Temporary employees are generally hired on a temporary or project-specific basis, with either full- or part-time hours. Seasonal employees are hired on a temporary basis during a time of year when extra work is available. Hourly/temporary/seasonal employees are not eligible for most School benefits.</i></b></li> </ul> <p><b><i>You will be informed of your classification, status, and responsibilities at the time of hire and at any time your classification, status, or responsibilities change. If you have a question regarding this</i></b></p>

**information, contact your supervisor or Human Resources. These classifications do not alter your employment at-will status.**

Employee Status	Exempt	NonExempt (hours per week)	Benefit Tier
Regular Full Time	.80+ FTE	32+ hours	Tier 2
Regular Part Time	.60-.79 FTE	24-31 hours	Tier 1
Non-Regular (Hourly/Temporary/Seasonal)	.59 FTE or less	Less than 24 hours/week	Not eligible

**Student Counts**

The teacher may indicate their desired student count with the School as a request. The leadership team will review the request to determine if an accommodation can be made. Final determination of student roster count will be made based on the needs of the School.

**Section IV, C. Job Duties**

Revise:

The assigned supervisor will clarify the job duties and the expectations for behavior and job performance. The employee’s job responsibilities and tasks are subject to change and update during employment as stated in the at-will employment agreement and job description. On occasion, the employee may be asked to work on projects, or to help with other work necessary or important to the operation of their department or the School. The employee’s cooperation and assistance in performing such additional work is expected. The School reserves the right, at any time, with or without notice, to alter or change job responsibilities, reassign or transfer any employee’s job positions, or assign additional job responsibilities.

***If you have any questions regarding your job description or the scope of your duties, please speak with the Director of Human Resources.***

<p>Section IV, D. Nonexempt Employees</p>	<p>Revise:</p> <p>1. Work Schedules</p> <p><b><i>The School's business hours of school sites and offices (if any) and employee work schedule shall be established by the CEO or designee. The CEO or designee will assign the staff's individual work schedule to ensure appropriate staffing throughout the workday to serve the business functions of the School. Employees are expected to be at their desks or workstations at the start of their scheduled shifts, ready to work, free from personal or environmental distractions.</i></b></p> <p><b><i>Employees may not work outside of their work schedule without the preapproval of their supervisor. Failure to obtain preapproval before working outside of the work schedule may subject the employee to disciplinary action up to and including termination.</i></b></p> <p><del>For the purposes of pay and leave accrual calculations, full-time for classified employees, is defined as 2,080 working hours.</del> Work schedule exchanges will be reviewed on a case by case basis as long as the exchange does not interfere with normal operations or result in excessive overtime. Exchanging work schedules with other employees may be authorized by the supervisor or their designee when necessary.</p> <p>The workweek begins at 12:01 a.m. Monday and ends at midnight on Sunday.</p> <p>2. Rest Breaks and Meal Periods</p> <p><i>a. Rest Breaks</i></p> <p>Rest breaks are on the clock and duty-free. Employees are expected to return to work promptly at the end of any rest breaks.</p> <p><i>b. Number of Rest Breaks</i></p> <p>Nonexempt employees are provided one (1) paid ten-minute rest break for every four (4) hours worked (or major fraction thereof, which is defined as any amount of time over two (2) hours). A rest break is not authorized for employees whose total daily work time is less than three and one half (3.5) hours.</p> <p>If the employee works a shift from three and one-half (3.5) to six (6) hours in length, they will be entitled to one (1) paid ten-minute rest break. If they work more than six (6) hours and up to 10 hours, they will be entitled to two (2) paid ten-minute rest breaks. If the employee works more than 10 hours and up to 14</p>
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hours, they will be entitled to three (3) paid ten-minute rest breaks.

*c. Timing of Rest Breaks*

The employee is authorized and permitted to take a rest break in the middle of each four-hour work period. There may be practical considerations that make this general timing infeasible and that require the School to deviate from this general rule. The employee will be informed if there are practical considerations that make this timing infeasible. In the event of these considerations, the immediate supervisor may need to schedule the rest breaks.

*d. Meal Period*

All nonexempt employees will be provided an uninterrupted unpaid meal period of at least 30 minutes if working more than five (5) hours in a workday. The employee must clock out for the meal period and will be permitted a reasonable opportunity to take this meal period. During the meal period, the employee is relieved of all duty and is free to leave the premises. The employee is expected to return to work promptly at the end of the meal period.

If the total work period for the day is more than five (5) hours per day, but no more than six (6) hours, the meal period may be waived. This cannot be done without the mutual consent of the employee and HR. Any such waiver must be requested and approved with HR and supervisor in advance.

*e. Timing of Meal Period*

As with rest breaks, the employee is authorized and permitted to take a meal period.

The meal period will be provided no later than the end of the fifth hour of work. For example, if work begins at 8:00 a.m., the meal period must begin by 12:59 p.m. (which is four hours and 59 minutes into the shift).

There may be practical considerations that make this general timing infeasible and that require the School to deviate from this general rule. The immediate supervisor may need to schedule the timing of an employee's meal period to ensure efficient business operations.



*f. Second Meal Period*

If the employee works more than 10 hours in a day, they will be provided a second, unpaid meal period of at least 30 minutes. Again, the employee must clock out for the meal period and will be permitted a reasonable opportunity to take this meal period; the employee will be relieved of all duty. During the meal period, the employee is relieved of all duty and is free to leave the premises. The employee is expected to return to work promptly at the end of the meal period.

Depending on the circumstances, the employee may be able to waive the second meal period if the first meal period was taken and if the total hours worked for the day is no more than twelve hours. This cannot be done without the mutual consent of the employee and HR. Any such waiver must be requested and approved with HR and supervisor in advance.

*g. Timing of Second Meal Period*

As with rest breaks, the employee is authorized and permitted to take a meal period. A second meal period is required if the employee's hours exceed 10 hours in one workday.

This second meal period will be provided no later than the end of the 10th hour of work. For example, if work begins at 8:00 a.m., the employee must start the second meal period by 5:59 p.m. (which is 9 hours and 59 minutes into the shift).

There may be practical considerations that make this general timing infeasible and that require the School to deviate from this general rule. The immediate supervisor may need to schedule the timing of an employee's meal period to ensure business operations.

*h. Recording Time ~~Meal Periods~~*

~~The employee must clock out for any meal period and record the start and end of the meal period. Employees are not allowed to work "off the clock." Work time must be accurately reported on the time record.~~

***California Pacific Charter Schools is required by applicable federal, state, and local laws to keep accurate records of hours worked by certain employees. To ensure that the School has complete and accurate time records and that employees are paid for all hours worked, nonexempt employees are required to record all working time using the School's timekeeping application. The Payroll department***

***will provide staff with specific instructions for using the online system.***

***You must accurately record all of your time to ensure you are paid for all hours worked, and must follow established School procedures for recording your hours worked. Time must be recorded as follows:***

- ***Immediately before starting your shift.***
- ***Immediately after finishing work, before your meal period.***
- ***Immediately before resuming work, after your meal period.***
- ***Immediately after finishing work.***
- ***Immediately before and after any other time away from work.***

***Employees are required to clock in no more than five minutes before their start time and clock out no later than five minutes after the end of their shift.***

***Notify your supervisor or payroll of any pay discrepancies, unrecorded or misrecorded work hours, or any involuntarily missed meal or rest break periods.***

*i. Missed Rest Breaks and Meal Periods*

If for any reason the employee is not provided a rest break or meal period in accordance with the policy, or if they are in any way discouraged or impeded from taking their rest break or meal period, or from taking the full amount of time allotted to them, the employee may be eligible for a missed rest break or meal period remedy and should immediately notify HR.

Anytime the employee misses a rest break or meal period that was provided to them (or they work any portion of a provided meal period), they will be required to report the time to ***their supervisor and payroll*** HR and document the reason for the missed rest break and meal period.

~~Please also refer to the School's Timekeeping Policy.~~

### 3. Timekeeping

All nonexempt employees are required to record time worked for payroll purposes. Employees must record their own time at the start and at the end of each work period, including before and after the meal period. Altering with this procedure in any way is not permissible and is subject to disciplinary action. Final timesheets in the payroll system are to be approved by the employee and the supervisor **at the end of each pay period**~~prior to each payroll~~. Any errors on the timesheet should be reported immediately to HR. Employees with consistent patterns of not following time recording responsibilities are subject to disciplinary actions.

All communication between the nonexempt employee and management concerning work related issues is not permitted after hours. Once the nonexempt employee has recorded the end of a work period at the end of the day, that employee is no longer clocked in. All work related correspondence will resume the next workday except in the case of an emergency or at the direction of the supervisor. Nonexempt employees will be compensated at the appropriate rate of pay for any additional time worked outside of their workday.

### 4. Pay for Mandatory Meetings/Training

The School will pay nonexempt employees for attendance at meetings, lectures, and training programs when attendance is mandatory, and the meeting, course, or lecture is directly related to the job and is outside of the regular schedule. Unless otherwise noted, trainings and meetings are included as part of an exempt employee's regular pay.

### 5. Overtime

All overtime work must be requested in advance by the employee and authorized by the supervisor prior to the time to be worked. Nonexempt employees may be directed to work overtime as necessary. Only actual hours worked each workday or workweek can apply in calculating overtime. The School provides compensation for all overtime hours worked by nonexempt employees in accordance with state and federal law. All hours worked in excess of eight (8) hours in one workday or 40 hours in one workweek will be treated as overtime. A workday begins at 12:01 a.m. and ends at midnight 24 hours later. The work week begins at 12:01 a.m. Monday and ends at midnight on Sunday.

Compensation for hours in excess of 40 hours for the workweek, or in excess of eight (8) hours and not more

	<p>than 12 hours for the workday, and for the first eight hours on the seventh consecutive day of work in one workweek, shall be paid at a rate of one-and-one-half times the employee's regular rate of pay. Compensation for hours in excess of 12 hours in one workday and in excess of eight (8) hours on the seventh consecutive workday in a workweek shall be paid at double the regular rate of pay.</p>
<p>Section IV, G. Employee Evaluation</p>	<p>Revise:</p> <p>Supervisors will conduct performance reviews with all regular full-time and regular part-time employees annually. Supervisors may conduct informal performance reviews and goal setting sessions more often if they choose.</p> <p>Performance reviews are designed for the supervisor and the employee to discuss their current job tasks, encourage and recognize attributes, and discuss positive, purposeful approaches for meeting work-related goals. Together, the employee and supervisor will discuss ways in which the employee can accomplish goals and/or learn new skills.</p> <p><b><i>Successful job performance is a factor in consideration for salary step advancement.</i></b> <del>Performance review and goal setting sessions may or may not have a direct affect on any changes in salary compensation.</del> For this reason, among others, it is important to prepare for these reviews carefully, and participate in them fully.</p> <p>Additional details on employee evaluations will be provided by HR upon hire and annually as appropriate.</p>
<p>Section IV, I. Procedure for Disciplinary Action</p>	<p>Remove due to redundancy.</p>
<p>Section IV, N. Out of State Work Policy</p>	<p>Add policy already approved by the Board.</p> <p><b><i>O. Out of State Work Policy</i></b> <b><i>California Pacific Charter Schools (“CalPac” or the “School”) is a nonprofit corporation that operates charter schools serving students in the state of California. Due to the online nature of the work at</i></b></p>

***CalPac, several employees have either moved out of the state or have been hired into positions at the School while residing out of the state of California. CalPac has attempted to support employees in this decision without termination; however, with employees working in several different states, it has become increasingly costly and burdensome for the School to navigate the various rules, laws, and compliance requirements of each state.***

***For the purpose of this Policy, the term “out of state” refers to any work location outside the state of California. Employees who remain domiciled in California (i.e. military orders or transfers where residency is maintained in California) may not be considered to be out-of-state employees, subject to the laws of the state in which the employee resides.***

***Effective June 13, 2023, the following rules and procedures will apply regarding employees working out of state.***

***Employees who currently work out of state will not have their out-of-state status be a bar to their continued at-will employment provided they continue to reside in the same state as of the effective date of this policy or move back to California, the funding for the employee’s position is secure, and the employee meets performance expectations for their position.***

***Candidates for future employment will be selected first from those residing within the state of California and will be required to remain within the state of California as a condition of employment. Additionally, current employees seeking promotion, advancement, or reassignment will be subject to the same residency rules. The Superintendent may authorize out of state employment on an emergency case by case basis where physical presence is not required and/or for specialized positions that are difficult to fill (i.e. shortage areas such as special education, math, and science instruction).***

***Employees must provide sixty (60) days’ written notice to CalPac if they plan to move out of state. Employees who move out of state may be subject to termination from their at-will employment at the School. Additionally, other than attending conferences or training, employees may not perform any work out of state without prior written approval from the School, as this may require the School to treat***

	<p><i>the employee as an out of state worker and subject the School to the employment laws of the out of state location.</i></p> <p><i>This policy applies to all employees of CalPac regardless of classification. Nothing in this policy is intended to alter the at-will employment status or to provide a guarantee of continued employment as outlined in board policy 4010-CPCS or the employment agreement. Violation of this policy may result in discipline, up to and including termination of the at-will employment.</i></p>
<p>Section V, F. Inclement Weather/Emerg ency Closings</p>	<p>Revise:</p> <p>At times, emergencies such as severe weather, fires, or power failures can disrupt School operations. The decision to close the office will be made by the CEO or designee. When the decision is made to close the office, employees will receive official notification from their supervisors. <b>Employees will be paid for any remaining portion of their work day for the first day of the declared emergency closing. If the office continues to be closed, office employees will be expected to transition to remote work. An employee who is unable to transition to remote work may utilize their available applicable leave to remain in paid status.</b> <del>Time off from scheduled work due to emergency closings will be unpaid for all nonexempt employees. However, employees eligible for vacation may elect to utilize their available vacation hours in order to remain in paid status.</del> Employees may not be retaliated against for leaving the office during emergency circumstances when their safety is in jeopardy.</p> <p>Employees are encouraged to listen to local news and radio reports for status updates. In general, the School will follow the decisions of the local community. Days that the School is closed due to inclement weather or other emergency may create a need to extend the work year or shorten holiday breaks.</p>
<p>Section VI, B. Student Safety</p>	<p>Revise:</p> <p>The effective employee is concerned for the welfare of students and takes measures to ensure their welfare. Nevertheless, it is important to be aware of the possible consequences of negligence. The employee is responsible to act in a reasonable and prudent manner at all times. Specifically, the employee must do the following:</p> <ol style="list-style-type: none"> <li><b>1. Always ensure that online students are supervised and have another responsible adult present</b></li> </ol>

	<p><del><b>when they are in online classrooms.</b> Never leave students unsupervised and ensure that another responsible adult is present when leaving students.</del></p> <ol style="list-style-type: none"> <li>2. Require students to conduct themselves in an orderly, safe manner and administer such disciplinary actions as are reasonable and proper in any situation involving student misconduct.</li> <li>3. Report any unsafe conditions to the supervisor so that it may be corrected.</li> <li><b>4. Ensure Zoom settings are correct for student safety.</b></li> <li>5. Strictly adhere to all stated policies of the School.</li> </ol> <p>Failure by employees to meet their responsibilities may have severe consequences (e.g., revocation of their license, criminal charges, etc.). Additionally, teachers may be held legally liable for negligence in the performance of their duties.</p>
<p>Section VII, G. Retirement Plan Offerings</p>	<p>Revise: The School is committed to providing retirement benefits to its employees. Plan details may be obtained through HR.</p> <p>403(b)/457(b) Deferred Compensation Plan All employees can open a 403(b) and/or 457(b) account and make employee contributions through payroll deductions.</p> <p>Employer Contributions: <del>The employer contribution towards a deferred benefit plan is based on an eligible employee's active contribution to a 403(b) or 457(b) account.</del> <b>The School will contribute to a 457(b) for eligible classified employees. In order to receive employer contributions, the e</b>Eligible employees must <b>first open a 457(b) account.</b> <del>in order to receive the employer contribution.</del> <b>The employer will then provide a guaranteed contribution of 3% to the eligible employee's account starting with the first payroll in the month following the establishment of the account.</b></p> <p><b>Additionally, the employer will provide a matching</b> <del>contribution will be made</del> to the employee's 457(b) account in an amount not to exceed <del>a matching contribution</del> up to 5% of the employee's base annual salary. Eligible employees are immediately vested in employer contributions, <b>however,</b> <del>—</del>Seasonal employees are not eligible for employer contributions.</p>

	<p><u>Eligible Classified Employees:</u> To be eligible for an employer contribution, a classified employee must work at least 204 hours/week <b>as part of the regular work schedule for the assignment.</b></p> <p><del>Certificated Employees:</del> To be eligible for an employer contribution, a certificated employee must serve a minimum number of students, work at least 20 hours/week, or have an assignment at least 0.5 FTE.</p> <p>Certificated staff participating in CalSTRS are not eligible for an employer contribution to a 457(b) plan.</p>
<p>Section VII H.4. Hotel Rooms</p>	<p>Revise:</p> <p>4. Hotel Rooms</p> <p>Lodging shall be for those days associated with attending the activity, including, if necessary, the night before. Good judgment shall be used to seek the most reasonable accommodations. <b>In most cases, the School will assist employees with hotel and travel arrangements. For employees making their own reservations, h</b>Hotel rooms are reimbursed for employees traveling over <del>80</del> 120 miles one way. <b>Typically, a</b> hotel stay for a distance less than <del>80</del> 120 miles <b>from the employee's home, will require</b> must have prior approval. Hotel rooms must be under \$200 per night before taxes. If an employee chooses to stay at a hotel that exceeds this, when a hotel within price range and a 15 mile radius is available, the balance above and beyond must be deducted from the total expense on the expense report. If a hotel is not available within this price range, pre-approval of the expenditure is required. Upon checkout from the hotel, the employee must obtain and submit a zero balance sheet in order to be reimbursed for a hotel charge.</p>
<p>Section VII, Paid Sick Leave</p>	<p>Revise:</p> <p>Any unused sick hours will roll over from year to year. Sick leave hours will not be advanced to an employee ahead of the earned accrual rate. Accrued, but unused sick days are not paid out by the School at the time of separation. However, employees who terminate employment and are rehired within one (1) year of termination (or 6 months for employees working in the city of San Diego) regain their previously unused accrued sick leave. <b>Certificated employees who separate from CalPac and whose sick leave was transferred to another school, will have their transfer sick leave applied once the sick leave transfer form has been returned by the former school.</b></p>



<p>Section VIII, D.9. Lactation Accommodation</p>	<p>Revise:</p> <p>9. <del>Lactation</del><b><i>Pregnancy Related</i></b> Accommodation <b><i>California Pacific Charter Schools will provide reasonable accommodation to pregnant employees for known limitations related to pregnancy, childbirth, or other related medical conditions in accordance with the federal Pregnant Workers Fairness Act (PWFA).</i></b></p> <p><b><i>If you require an accommodation, notify the Director of Human Resources. If the need for a particular accommodation is not obvious, you may be asked to include relevant information such as:</i></b></p> <ul style="list-style-type: none"> <li>● <b><i>The reason you need an accommodation.</i></b></li> <li>● <b><i>A description of the proposed accommodation.</i></b></li> <li>● <b><i>How the accommodation will address limitations caused by pregnancy, childbirth, or related medical conditions.</i></b></li> </ul> <p><b><i>The School will not require you to accept any accommodation without engaging in the interactive process to accurately understand your limitations and explore potential accommodations. The School is not required to make your specific requested accommodation and is not required to provide any accommodation that would constitute an undue hardship on the School.</i></b></p> <p><b><i>If leave is provided as a reasonable accommodation, it may run concurrently with leave under the federal Family and Medical Leave Act and/or any other leave where permitted by law. The School will comply with state or local laws that provide additional protections beyond the PWFA. The School will not retaliate against employees who request or receive an accommodation under this policy.</i></b></p> <p><b><i>10. Lactation Accommodation</i></b></p> <p>The School will provide a lactation break for a reasonable amount of time to accommodate an employee's need to express breast milk. Employees in need of lactation breaks should contact their supervisor and human resources to allow for the School to determine a private space and ensure the reasonable time for breaks is provided. Human Resources and the supervisor will assist the employee in identifying a proper location that is close to the employee's work area, shielded from view, and free from intrusion. Additionally, where applicable, the School will provide access to a sink with running water and a refrigerator for storing</p>
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	<p>breast milk.</p> <p>The lactation break shall, if possible, run concurrently with any rest break or meal period already provided to the employee. For non-exempt staff, any additional time needed to express milk outside of the normal rest break and meal period is to be off the clock. If the employee needs additional time past the breaks typically provided in a day, the employee should contact their supervisor and human resources. If a space and break is not provided when requested, please contact human resources.</p>
<p>Section VIII, O. Other Types of Leave</p>	<p>Revise:</p> <ul style="list-style-type: none"> <li>• Military spousal leave: This leave provides employees up to 10 days of unpaid, protected leave, to spend time with a spouse or registered domestic partner who is home during a period of military deployment. <b>Employees may use available sick leave for the purpose of military spousal leave. Additionally, employees may be eligible for Paid Family Leave through the state of California or FMLA for this type of leave. Please contact HR for more information.</b></li> </ul>
<p>Section VIII, Q. Holidays</p>	<p>Revise:</p> <p>Unless otherwise provided in this policy, all employees will receive time off for each observed holiday. To qualify for holiday pay, an employee must be a regular full time <b>or part time</b> (<del>thirty</del> twenty four or more hours per week) classified employee in paid status on the working day immediately preceding <b>and or</b> following the holiday. A holiday that falls during a classified employee's vacation time or sick time is paid as a holiday and is not deducted from vacation or sick-leave balances. <b>Employees required by their supervisor to work on a scheduled school holiday who are eligible for holiday pay, will in addition to holiday pay, receive compensation for the actual hours worked.</b></p> <p><b>Classified employees working at least 80% FTE will be compensated 8 hours for each observed school holiday falling within the employee's work year calendar. Classified employees working between 60% - 79% FTE will be compensated 4.8 hours for each observed school holiday falling within the employee's work year calendar.</b></p>
<p>Section VII, R. Vacation (Classified Employees)</p>	<p>Replace:</p> <p><b>R. Vacation (Classified Employees)</b></p> <p><del>The School's vacation policy is intended to provide eligible classified employees with time away from work for relaxation and renewal. In order to be eligible for vacation accrual, an employee must be a full time (thirty</del></p>

~~two or more hours per week) classified exempt or nonexempt employee.~~

~~Vacation accrual begins on the first day of employment, and employees are eligible for vacation upon successful completion of 30 days of continuous employment. Eligible employees will accrue one day of vacation per month in paid status (e.g. an 8 hour/day 12 month employee will earn 12 days of vacation or 96 hours). Vacation accruals per pay period are displayed in the payroll system and on the employee's pay stubs.~~

Vacation Accrual <i>Classified Staff</i>					
	Full Time Equivalent (FTE)	Hours Worked Per Week	Non-Exempt: Per Semi Monthly Pay Period	Exempt: Per Pay Monthly Period	Total Sick Hours Accrued Per Month
Full Time	.80+	32+	4 hours/4 hours	8 hours	8 hours
Part Time	.775 or less	31 or less	not eligible	not eligible	not eligible

~~As a general practice, the supervisor will make an effort to approve a vacation request that is mutually convenient for the employee and the School. A requested vacation will be approved if the absence does not cause a disruption of service or place an undue burden on fellow employees. All vacation requests must be made in advance of the time to be taken. Any changes to a vacation request must be pre-approved by the supervisor at least three (3) business days prior to the start of the requested date of vacation, except in an emergency situation. Failure to get pre approval may result in disciplinary action. The supervisor may determine peak times in which vacations may not be approved.~~

~~Employees may be required to use their earned vacation hours during school recess. Vacation can be used in increments of 1 hour and only used from the employee's available accrual. Vacation hours cannot be advanced ahead of the earned accrual. Accrued and unused vacation hours will roll over from year to year but are capped at one and a half times the annual rate of accrual. Employees will not accrue any additional~~

~~vacation until their balance has dropped below the annual cap.~~

~~Terminating employees (voluntary or involuntary discharge, death, end of employment agreement, etc.) will be paid all accrued and unused vacation in their final paycheck.~~

*The School's vacation policy is intended to provide eligible staff with time off from work for rest, recreation, or to attend to personal matters. This policy is subject to change at the discretion of the School.*

*Vacation days must be requested and approved in advance of the time off from work. Employees must submit their request to their supervisor or manager through the leave system at least two (2) weeks prior to the requested time off, except in cases of unforeseeable circumstances. Vacation may be used in increments of no less than one (1) hour. Any changes to a vacation request must be pre-approved by the supervisor at least three (3) business days prior to the start of the requested date of vacation, except in an emergency situation. Approval of vacation days are subject to the needs of the school. A requested vacation will be approved if the absence does not cause a disruption of service or result in issues of coverage. Failure to obtain pre-approval for vacation may result in disciplinary action.*

*Employees will become eligible for vacation accrual after completing three (3) months of continuous service. Vacation time may not be utilized before it is earned. Accrued and unused vacation hours will roll over from year to year, but are capped at one and a half times (1.5) the employee's annual rate of accrual. Employees will not accrue any additional vacation until their balance has dropped below the annual cap. When some vacation is used, vacation compensation will begin to accrue again. There is no retroactive grant of vacation compensation for the period of time the accrued vacation compensation was at the cap.*

*Earned vacation accruals are displayed in the payroll system and on the employee's pay stub. Upon separation from the School, employees will be paid for any accrued, but unused vacation days in accordance with applicable laws and School policy.*

*(Certificated Employees)*

*Certificated employees are entitled to vacation terms based upon date of hire, length of service, and status with the School. Certificated employees shall accrue three (3) days of paid vacation each year prorated based on FTE, length of employment, and percentage of time the employee was vacation eligible.*

*For certificated employees, requests for vacation will not be granted during the first two (2) weeks and last two (2) weeks of the school semester or during testing windows. The supervisor may determine additional peak times in which vacations may not be approved.*

<i>Vacation Accrual Certificated Staff</i>			
<i>Eligibility Status</i>	<i>Full Time Equivalent (FTE)</i>	<i>Hours Worked Per Week</i>	<i>Total Annual Accrual</i>
<i>Full Time Tier 2</i>	<i>.80+</i>	<i>32+</i>	<i>24 hours</i>
<i>Part Time Tier 1</i>	<i>.60 - .79</i>	<i>24-31</i>	<i>18 hours</i>

*(Classified Employees)*

*Classified employees are entitled to vacation terms based upon assignment FTE, date of hire, length of service, and status with the School. Vacation will accrue beginning on the first day in paid status, but may not be used until after completing three (3) months of continuous service. Employees may be required to apply their earned vacation hours during school recess.*

*As a general practice, the supervisor will make an effort to approve a vacation request that is mutually convenient for the employee and the School. The supervisor may determine peak times in which vacations may not be approved.*

<i>Vacation Accrual Classified Staff</i>						
<i>Eligibility Status</i>	<i>Full Time Equivalent (FTE)</i>	<i>Hours Worked Per Week</i>	<i>Non-Exempt: Per Semi Monthly Pay Period</i>	<i>Exempt: Per Monthly Pay Period</i>	<i>Total Hours Accrued Per Month</i>	<i>Total Max Annual Accrual</i>

<b>Full Time Tier 2</b>	<b>.80+</b>	<b>32+</b>	<b>4 hours/4 hours</b>	<b>8 hours</b>	<b>8 hours</b>	<b>96 hours</b>
<b>Part Time Tier 1</b>	<b>.60-.79</b>	<b>24-31 hours</b>	<b>1 hour/1 hour</b>	<b>2 hours</b>	<b>2 hours</b>	<b>24 hours</b>

***(Classified Managers)***

***Classified managers are entitled to vacation terms based upon assignment FTE, date of hire, length of service, and status with the School. Vacation will accrue beginning on the first day in paid status, but may not be used until after completing three (3) months of continuous service. Employees may be required to apply their earned vacation hours during school recess.***

***As a general practice, the supervisor will make an effort to approve a vacation request that is mutually convenient for the employee and the School. The supervisor may determine peak times in which vacations may not be approved.***

<b><i>Vacation Accrual Classified Manager</i></b>						
<b><i>Eligibility Status</i></b>	<b><i>Full Time Equivalent (FTE)</i></b>	<b><i>Hours Worked Per Week</i></b>	<b><i>Non-Exempt: Per Semi Monthly Pay Period</i></b>	<b><i>Exempt: Per Monthly Pay Period</i></b>	<b><i>Total Hours Accrued Per Month</i></b>	<b><i>Total Max Annual Accrual</i></b>
<b><i>Full Time Tier 2</i></b>	<b><i>.80+</i></b>	<b><i>32+</i></b>	<b><i>6 hours/6 hours</i></b>	<b><i>12 hours</i></b>	<b><i>12 hours</i></b>	<b><i>144 hours</i></b>
<b><i>Part Time Tier 1</i></b>	<b><i>.60-.79</i></b>	<b><i>24-31 hours</i></b>	<b><i>3 hour/3 hour</i></b>	<b><i>6 hours</i></b>	<b><i>6 hours</i></b>	<b><i>72 hours</i></b>

Section IX, Arbitration Agreement

The Arbitration Agreement is a separate policy incorporated into the Employment Agreement documents. Replace:

***Agreement to Arbitrate Disputes and Claims***

***As a condition of employment, the School and employee shall enter into an agreement to submit to binding arbitration any and all disputes or employment claims they could otherwise pursue in court, with the exception of those areas not covered in the agreement by law. For additional information, refer to the Employment Agreement and the Arbitration Agreement documents.***

~~This Mutual Arbitration Agreement (“Agreement”) is entered into between California Pacific Charter Schools and the employee named below (“Employee”) (collectively the “Parties”).~~

~~Voluntary Agreement~~

~~Employee understands that this is a voluntary agreement, meaning it is not a condition of employment or continued employment. Employee further understands that the Nonprofit is not offering any employment-related benefit in exchange for entering into this agreement.~~

~~Agreement to Arbitrate Disputes and Claims~~

~~As a condition of employment, tThe School and employee shall enter into an agreementmutually agree to submit to binding arbitration any and all disputes or employment claims they could otherwise pursue in court, with the exception of those areas not covered in the agreement by law. For additional information, refer to the Employment Agreement and the Arbitration Agreement documents. arising from or relating to employee’s recruitment to or employment with the School, or the termination of that employment, including claims against any current or former agent or employee of the School, whether the disputes or claims arise in tort, contract, or pursuant to a statute, regulation, or ordinance now in existence or which may in the future be enacted or recognized, including, but not limited to, the following:~~

- ~~● claims for fraud, misrepresentation, promissory estoppel, fraudulent inducement of contract or breach of contract, whether such alleged contract or obligation be oral, written, or express or implied;~~
- ~~● claims for wrongful termination of employment, violation of public policy and constructive discharge, infliction of emotional distress, interference with contract or prospective economic advantage, defamation, unfair business practices, invasion of privacy;~~
- ~~● claims for employment discrimination, retaliation or harassment~~

- ~~claims for violation of local, state or federal wage and hour laws, such as non-payment or incorrect payment of wages, sick pay, commissions, bonuses, severance, employee fringe benefits, or stock options:~~

~~The School and employee understand and agree that the arbitration of the disputes and claims covered by this Agreement shall be the sole and exclusive mechanism for resolving any and all existing and future disputes or claims arising out of employee's recruitment to or employment with the School or the termination thereof, except as set forth below.~~

~~Claims Not Covered by this Agreement~~

~~The following claims are not subject to arbitration under this Agreement: (1) claims for workers' compensation benefits, state or federal disability benefits or state unemployment benefits; (2) administrative charges or claims filed with a federal, state or local government office or agency, such as the Equal Employment Opportunity Commission ("EEOC") or any comparable state anti-discrimination agency, or the National Labor Relations Board ("NLRB"); (3) claims for sexual harassment or assault that occurred on or after March 3, 2022, or any other claims that, as a matter of law, the Parties cannot agree to arbitrate, or that would make this Agreement voidable under the Ending Forced Arbitration of Sexual Assault and Sexual Harassment Act of 2021; (4) any claims that, as a matter of law, cannot legally be subject to arbitration; (5) claims under an employee benefit or pension plan that specifies a different arbitration procedure; or (6) litigation pending in a state or federal court as of the date Employee signs this Agreement.~~

~~Waiver of Right to Trial~~

~~The School and employee understand and agree that the arbitration of disputes and claims under this Agreement shall be instead of a trial before a judge or jury. The School and employee understand and agree that, by signing this Agreement, they are expressly waiving, to the fullest extent permitted by law, any and all rights to a trial before a judge or jury, regarding any disputes and claims they may have that are subject to arbitration under this Agreement.~~

~~No Consolidation of Claims / Waiver of Class Claims~~

~~The School and employee agree to individualized arbitration, with claims pertaining to different employees to be heard in separate proceedings. This means that no other person shall be entitled to join or consolidate in arbitration any claim by or against other current or former School employees. As such, except as set forth above, the School and employee agree that both the School and employee hereby waive any right to bring on behalf of other persons, or to otherwise participate in, a class, collective or representative action (i.e. a type of lawsuit in which one or several persons sue on behalf of a larger group of persons).~~



**Arbitration Procedures; Final and Binding Award**

~~The arbitration shall be conducted by a single neutral arbitrator in accordance with the then-current Employment Arbitration and Mediation Procedures of the American Arbitration Association (“AAA”), which can be viewed at <http://www.adr.org/employment>. The School will provide the employee with a copy of these rules upon request. The arbitration shall take place in the county of the state in which the employee is or was last employed by the School, unless the School and the employee mutually agree on a different location. All parties shall be entitled to engage in reasonable pre-hearing discovery to obtain information to prosecute or defend the asserted claims. Any disputes between the parties regarding the nature or scope of discovery shall be decided by the arbitrator. The arbitrator shall hear and issue a written ruling upon any motions brought by either party, including but not limited to, motions for summary judgment or summary adjudication of issues.~~

~~After the hearing, the arbitrator shall issue a written decision setting forth the award, if any, and explaining the basis therefore. The arbitrator shall have the power to award any type of relief that would be available in court. The arbitrator’s award shall be final and binding upon the parties and may be entered as a judgment in any court of competent jurisdiction. In the event of any conflict in the arbitration procedures set forth in this Agreement and the AAA rules specified above, the AAA rules shall control.~~

~~Notwithstanding the foregoing, and regardless of what is provided by AAA’s rules, the arbitrator will not have authority or jurisdiction to consolidate claims of different employees into one proceeding, nor shall the arbitrator have authority or jurisdiction to hear the arbitration as a class, collective or representative action.~~

**Governing Law**

~~The School and employee understand and agree that any disputes and claims to be arbitrated under this Agreement shall be governed by the laws of the state in which the employee was employed at the time the arbitrable disputes or claims arose. This Agreement is governed by the Federal Arbitration Act. The School and employee intend that this Agreement be limited to those claims that may legally be subject to a pre-dispute arbitration agreement under applicable law. A court construing this Agreement may therefore modify or interpret it to render it enforceable.~~

**Costs of Arbitration**

~~The School and employee agree that the School will bear the arbitrator’s fee and any other type of expenses or cost that the employee would not be required to bear if they were free to bring the disputes or claims in court. Otherwise, the School and employee shall each bear their own attorneys’ fees and costs incurred in~~

~~connection with the arbitration. The arbitrator shall have the authority to award attorneys' fees and costs as required or permitted by applicable law. If there is a dispute as to whether the School or employee is the prevailing party in the arbitration, the arbitrator will decide the issue.~~

**Severability**

~~The School and employee understand and agree that if any term or portion of this Agreement shall, for any reason, be held to be invalid or unenforceable or to be contrary to public policy or any law, then the remainder of this Agreement shall not be affected by such invalidity or unenforceability but shall remain in full force and effect, as if the invalid or unenforceable term or portion thereof had not existed within this Agreement.~~

**Complete Agreement**

~~The School and employee understand and agree that this Agreement contains the complete agreement between the School and employee regarding the subjects covered in it; that it supersedes any and all contrary prior representations and agreements between the School and employee on these subjects, if any, and that it may be modified only in writing, expressly referencing this Agreement and employee by full name, and signed by an authorized representative of the School and the employee.~~

**Acknowledgements**

~~The employee has been advised to consult with an attorney of their own choosing before signing this Agreement. The employee agrees to read this Agreement carefully and understands that by signing it, they are waiving all rights to a trial or hearing before a judge or jury with respect to any and all disputes and claims regarding employee's employment with the School or the recruitment to or termination thereof that are subject to arbitration under this Agreement.~~

Agree to Mutual Arbitration Agreement

Decline to agree to Mutual Arbitration Agreement

Employee Name: \_\_\_\_\_

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

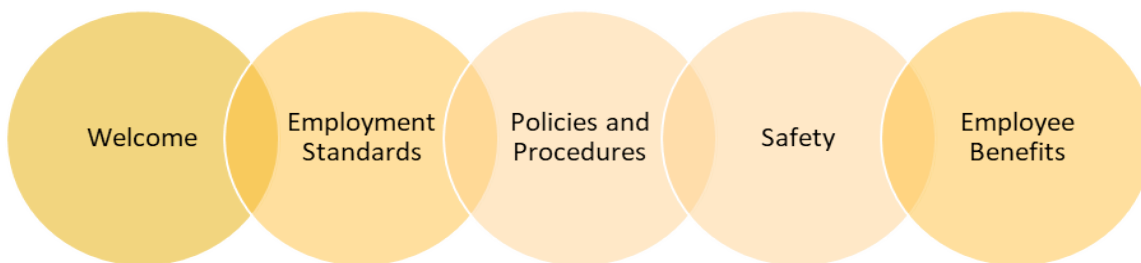
Date: \_\_\_\_\_



# California Pacific Charter Schools

## Employee Handbook

August 2023



The Employee Handbook may not be changed in any way without express written approval from the Board of Directors.

## Confirmation of Receipt of Handbook

I have received the School's Employee Handbook. I understand and agree that it is my responsibility to read and familiarize myself with its policies and procedures, including the Schools policy for preventing discrimination, harassment and retaliation. I have been given the opportunity to ask any questions I might have about the policies in the Handbook.

I understand that except for employment at-will status, any and all policies or practices can be changed at any time by the School. The School reserves the right to change my hours, wages, and working conditions at any time. I understand and agree that other than the CEO or Board of Directors, no manager, supervisor, or representative of the School has authority to enter into any agreement, express or implied, for employment for any specific period of time, or to make any agreement for employment other than at-will; only the CEO has the authority to make any such agreement and then only in writing, signed by the CEO or the Director of Human Resources on behalf of the CEO.

I understand and agree that nothing in the Employee Handbook creates or is intended to create a promise or representation of continued employment and that employment at the School is employment at-will; employment may be terminated at the will of either the School or myself. My signature certifies that I understand that the foregoing agreement on at-will status is the sole and entire agreement between the School and myself concerning the duration of my employment and the circumstances under which my employment may be terminated. It supersedes all prior agreements, understandings, and representations concerning my employment with the School.

---

Employee's Name

---

Employee's Signature

---

Date signed

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## Welcome to CalPac!

We are glad to have you on our team! You have joined an organization that focuses on the execution of high quality personalized learning using innovative delivery methods and technology to foster empowered, life-long learners. As an organization we seek to hire and retain high caliber individuals to meet our vision of extraordinary education.

The School complies with all federal and state employment laws, and this handbook generally reflects those laws. The School also complies with any applicable local laws, although there may not be an express written policy regarding those laws contained in the handbook.

The employment policies and/or benefits summaries in this handbook are written for all employees. Please take the time now to read this handbook carefully and sign the acknowledgement to show that you have read, understand, and agree to the contents of this handbook, which sets out the basic rules and guidelines concerning your employment. This handbook supersedes any previously issued handbooks or policy statements dealing with the subjects discussed herein. The School reserves the right to interpret, modify, or supplement the provisions of this handbook at any time. Neither this handbook nor any other communication by a management representative or other, whether oral or written, is intended in any way to create a contract of employment. Please understand that no employee handbook can address every situation in the workplace.

We truly value our employees and have developed this handbook to assist you with understanding our policies, procedures, and performance expectations. Keep in mind that the employee is responsible for reading and understanding the handbook as well as any posted revisions; however, if anything is unclear to you, please discuss the matter with your supervisor or Human Resources (HR). As a team member we want you to have a long and successful career with us - where you can make an impact on student education. We sincerely hope that you will find your employment here to be one of enrichment, collaboration, and an overall professionally rewarding experience. If you have questions about your employment or any provisions in this handbook contact Human Resources.

We wish you success in your employment here at California Pacific Charter Schools!

Sincerely,  
Christine Feher, Superintendent

## About CalPac

**Our Mission:** CalPac’s mission is to support and encourage all students to relentlessly pursue their life goals by providing an accessible, inclusive, and personalized learning community.

**Our Vision:** California Pacific Charter Schools, in partnership with our community, will:

**Nurture** - Foster an enriching school environment to nurture individuals academically, socially, and emotionally, so they are equipped to tackle academic challenges and become productive, responsible, ethical, creative, and compassionate members of society.

**Build** - Forge strong, positive connections with students so they can build confidence, achieve independence, meet current and future challenges, and develop social awareness, civic responsibility, and personal growth.

**Grow** - Provide our graduates with a foundation that will enable them to be college and career prepared to succeed in their post-secondary endeavors.

**Our Core Values:** CalPac CARES

Community, Accessible, Rigorous, Engaging, and Supportive

## Right to Revise

This handbook is the employee’s guide to understanding the provisions of their employment with California Pacific Charter Schools (“School”). Please be advised that written employment agreements between the School and individuals may replace some policies/procedures in this handbook. This handbook supersedes any and all prior published handbooks and any policy, memoranda, or benefits statements that are contrary to the policies that are outlined here.

The School reserves the right to revise, modify, delete, or add to any and all policies, procedures, work rules, or benefits stated in this handbook or in any other document, except for the policy of at-will employment. Any such changes to employment agreements must be in writing and must be signed by the CEO/Superintendent or designee.

Any written changes to this handbook will be distributed to all employees, so that employees will be aware of the new policies or procedures. No oral statements or representations can in any way alter the provisions of this handbook.

This handbook sets forth the policies and procedures applicable to employees of the School. Employees are expected to abide by all policies in this handbook. Nothing in this handbook or in any other personnel documents creates or is intended to create a promise or representation of continued employment for any employee. Nothing in this at-will statement is intended to interfere with an employee's rights to communicate or work with others toward altering the terms and conditions of their employment.

## At-Will Employment Status

School personnel are employed on an at-will basis. Employment at-will means that the employment relationship may be terminated, with or without cause and with or without advance notice at any time by the employee or the School. Nothing in this handbook shall limit the right to terminate at-will employment. No manager, supervisor, or employee of the School has any authority to enter into an agreement for employment for any specified period of time or to make an agreement for employment on other than at-will terms. Only the School has the authority to make any such agreement, which is binding only if it is in writing and approved by the Board of Directors.

Though many items surrounding employment may be changed or updated (such as the eligibility of benefits, promotion, or leaves) the status as an at-will employee does not change — the employment relationship may be terminated with or without cause and with or without advance notice, at any time by the employee or the School.

## Section I: Nondiscrimination Policies

### A. Equal Employment Opportunity

The School is an equal opportunity employer and makes employment decisions on the basis of merit. Selections for employment focus on the candidates whose training and experience most closely align with the position requirements, and fit with the School's mission, vision, and values.

California Pacific Charter Schools (CPCS) is committed to promoting a discrimination-free and harassment-free educational and work environment. CPCS prohibits discrimination and harassment regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation. CPCS also ensures equal opportunities for education and prohibits retaliation for reporting any violation of this

policy. Additionally, reporting, or assisting in reporting, suspected violations of this policy and cooperating in investigations or proceedings arising out of a violation of this policy are protected activities under this policy.

Discrimination can also include failing to reasonably accommodate religious practices or qualified individuals with disabilities where the accommodation does not pose an undue hardship. The School's management is responsible for adherence to this policy; however, in the final analysis, attainment of this goal of equal employment opportunity and enrichment through diversity depends on the commitment and good faith effort of everyone.

The School will comply with all applicable equal employment and discrimination laws, including Title IX, the California Fair Employment and Housing Act, the Americans with Disabilities Act, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination in Employment Act, and all other applicable laws. Additionally, Title IX prohibits discrimination on the basis of sex in education programs or activities by recipients of federal financial assistance. The School does not discriminate in the educational program or any activities which it operates, including employment in such programs and activities.

The School will continually strive to recruit and retain highly qualified employees and remain a competitive public school employer, including examining employee evaluation and compensation, and discipline/dismissal practices regularly.

In accordance with the School's Equal Employment and Nondiscrimination Policies, the School designates the following position(s) as the Title IX Coordinator and Coordinator for Nondiscrimination in Employment:

Mrs. Corrie Amador  
Director of Human Resources  
California Pacific Charter Schools  
940 South Coast Drive, Suite 185  
Costa Mesa, CA 92626  
[camador@cal-pacs.org](mailto:camador@cal-pacs.org)  
(949) 996-4556

Any employee or job applicant who believes they have been or are being discriminated against or harassed in violation of School policy should, as appropriate, immediately contact their supervisor, the Title IX Coordinator, or the CEO, or any person they feel comfortable going to who shall advise the employee or applicant about the School's procedures for filing, investigating, and resolving any such complaint.

Complaints regarding employment discrimination or harassment shall immediately

be investigated in accordance with School's policy and regulation. Individuals may use the School's Uniform Complaint Procedures to address complaints of discrimination and harassment, including sex discrimination under Title IX. Annual notice of such policies will be provided to all employees, and a copy of such policies and procedures are available by contacting the Title IX Coordinator or HR.

Discrimination is considered a form of employee misconduct. Disciplinary action, up to and including dismissal, will be taken against any employee engaging in this type of behavior. Any supervisor or manager who has knowledge of such behavior, yet takes no action to end it, is also subject to disciplinary action up to and including dismissal.

## B. Disability Accommodation

To comply with the Americans with Disabilities Act and all applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the School will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any applicant or employee who requires an accommodation in order to perform the essential functions of the job as outlined in the applicable job description should contact the HR department and discuss the need for an accommodation. The School will engage in an interactive process with the employee to identify possible accommodations, if any, which will help the applicant or employee perform the job. The School will implement reasonable accommodations that do not impose undue hardship.

## C. Anti-Harassment

The School is committed to providing a work environment free of harassment, discrimination, retaliation and abusive conduct as that term may be defined by statute or regulation then in effect at the time of the conduct. School policy prohibits conduct that is disrespectful, unprofessional as well as harassment based on actual or perceived race (including traits historically associated with race, including, but not limited to, hair texture and protective hairstyles such as braids, locks and twists), color, creed, actual or perceived gender (including gender identity and gender expression), religion (all aspects of religious beliefs, observance or practice, including religious dress or grooming practices), marital status, registered domestic partner status, status as a victim of domestic violence, assault or stalking, age (40 and over), ethnicity, national origin or ancestry (including language use restrictions), citizenship, physical, intellectual or mental disability (including HIV and AIDS), medical condition (including cancer or a record or history of cancer, and genetic characteristics), family or medical leave status, sex (including pregnancy, childbirth, breastfeeding or a related medical condition), genetic information, sexual orientation, political affiliation, military and veteran status or any other

consideration made unlawful by federal, state, or local laws. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.

All such conduct violates school policy. The School's anti-harassment policy applies to all persons involved in the operation of the School and prohibits harassment, disrespectful or unprofessional conduct by any employee of the School, including supervisors and managers, as well as vendors, community providers, customers, independent contractors, and any other persons. It also prohibits harassment, disrespectful or unprofessional conduct based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.

Prohibited harassment, disrespectful or unprofessional conduct includes, but is not limited to, the following behavior:

1. Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations or comments;
2. Visual displays such as derogatory and/or sexually-oriented posters, photography, cartoons, drawings or gestures;
3. Physical conduct including assault, unwanted touching, intentionally blocking normal movement or interfering with work because of sex, race or any other protected basis;
4. Threats and demands to submit to sexual requests as a condition of continued employment, or to avoid some other loss and offers of employment benefits in return for sexual favors;
5. Retaliation for reporting or threatening to report harassment; and
6. Communication via electronic media of any type that includes any conduct that is prohibited by state and/or federal law, or by the School policy.

Sexual harassment does not need to be motivated by sexual desire to be unlawful or to violate this policy. For example, hostile acts toward an employee because of their gender can amount to sexual harassment, regardless of whether the treatment is motivated by any sexual desire.

Harassment is considered a form of employee misconduct. Disciplinary action, up to and including dismissal, will be taken against any employee engaging in this type of behavior. Any supervisor or manager who has knowledge of such behavior, yet takes no action to end it, is also subject to disciplinary action.

It is the policy of the School that no one will be retaliated against for making a good faith complaint of harassment or for cooperating in the investigation of a complaint.

An employee who believes they have been harassed, discriminated against or retaliated against may initiate the reporting process by contacting their supervisor, or, if appropriate, the next level of management (see Reporting procedure, which follows), any team member they feel most comfortable reporting to, or the HR department. All discrimination, harassment and retaliation complaints will be promptly investigated and will be treated confidentially to the extent possible, and appropriate action taken where warranted. Complaints made in good faith are protected from retaliation of any kind.

### 1. Sexual Harassment

The School is committed to providing a work environment that is free from sexual harassment and retaliation. Under no circumstances will sexual harassment be tolerated.

"Sexual harassment" means any unwelcome sexual advance, unwelcome requests for sexual favors, or other unwelcome verbal, visual, or physical conduct of a sexual nature made by someone from or in the educational or work setting, whether it occurs between individuals of the same sex or individuals of opposite sexes, under any of the following conditions:

1. Submission to the conduct is explicitly or implicitly made a term or a condition of an individual's academic status, employment, or progress.
2. Submission to, or rejection of, the conduct by an individual is used as the basis for academic or employment decisions affecting the individual.
3. The conduct has the purpose or effect of having a negative impact upon the individual's academic performance, work, or progress or has the purpose or effect of creating an intimidating, hostile, or offensive educational or working environment. The conduct is sufficiently severe, persistent, pervasive or objectively offensive, so as to create a hostile or abusive educational or working environment or to limit the individual's ability to participate in or benefit from an education program or activity.
4. Submission to, or rejection of, the conduct by the individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities available at or through the local agency.

*"Verbal sexual harassment"* includes, but is not limited to, unwelcome epithets, comments, or slurs of a sexual nature.

*"Physical sexual harassment"* includes, but is not limited to, assault, impeding or blocking movement, or any physical interference with work or school activities or movement when directed at an individual on the basis of sex.



*"Visual sexual harassment"* includes, but is not limited to, derogatory posters, cartoons, drawings, obscene gestures, or computer-generated images of a sexual nature.

*"Educational environment"* includes, but is not limited to, the following:

1. The main administration offices of the local agency.
2. Properties controlled or owned by the local agency.
3. Off-campus, if such activity is sponsored by the local agency, or is conducted by organizations sponsored by or under the jurisdiction of the local agency.

Sexual harassment has no place in the work environment and is prohibited by the School. Specifically, it must in no way be exercised for purposes of an intimidating effect on employment decisions such as promotion, dismissal, hiring, training, wage and salary increases, transfer, or any other matter that affects the ability of an employee to perform job duties.

Any employee who engages or participates in sexual harassment, or who aids, abets, incites, compels or coerces another to commit sexual harassment or retaliates against another individual is in violation of this policy and subject to disciplinary action up to and including dismissal.

Managers and supervisors are to ensure that no such intimidation or harmful atmosphere of unwelcome sexual overtones exist in their workplaces. Every effort should be made to sensitize themselves and their employees to the differences between purely social overtones and those intended to affect working conditions. Also, employees are responsible for respecting the rights of their co-workers. Any employee who feels they have been harassed or retaliated against, or has knowledge of any incident of harassment or retaliation on any protected basis shall immediately report such incidents to their immediate supervisor, HR, the CEO or the Title IX Coordinator and Coordinator for Nondiscrimination in Employment. If the supervisor is the harasser or has not responded to the complaint, or if not an employee, then the complainant should complain to any administrator without fear of reprisal. Employees may also report instances of sexual harassment through the School's Uniform Complaint Procedure without fear of reprisal.

## 2. Reporting

The School has an affirmative duty to take reasonable steps to prevent and correct discrimination and harassment. Supervisors, co-workers, and third parties are prohibited from engaging in unlawful behavior under the Fair Employment and Housing Act or any other applicable law. Please see the list of protected categories as stated in the Equal Employment Opportunity and Anti-Harassment sections of the handbook.

The School encourages reporting of all perceived incidents of discrimination,



harassment or retaliation, regardless of the offender's identity or position. Individuals who believe that they have been the victim of such conduct should discuss their concerns with their immediate supervisor, manager, HR, CEO, or person they feel most comfortable and may file a complaint. The Uniform Complaint Procedures may be used for this purpose. Employees are entitled to report harassment to someone other than their direct supervisor. Supervisors are required to report all complaints to HR. In addition, the School encourages individuals who believe they are being subjected to such conduct to promptly advise the offender that their behavior is unwelcome and request that it be discontinued. The School recognizes, however, that an individual may prefer to pursue the matter through informal or formal complaint procedures. Every effort will be made to keep such reports as confidential to the extent possible, although it is understood that an investigation will normally require the involvement of third parties. The School is serious about enforcing its policy against harassment, discrimination and retaliation. However, the School cannot resolve a harassment, discrimination or retaliation problem that it does not know about. Therefore, employees are responsible for bringing any such problems to the School's attention so it can take the necessary steps to correct the problem.

### 3. Investigation/Complaint Procedure

All complaints of harassment, including sexual harassment, discrimination or retaliation may be addressed through the School's Uniform Complaint Procedures. A complaint will be followed by prompt and thorough investigation conducted by an impartial and qualified individual. If the investigation substantiates the accusations, the appropriate corrective action will be taken. This may include, but not be limited to, reprimand, suspension or dismissal, depending on the nature and severity of the offense.

Complaints will be documented and the School will designate a qualified individual to track the complaint process.

#### *a. Informal Procedure*

If for any reason an individual does not wish to address the offender directly, or if such action does not successfully end the offensive conduct, the individual should notify their immediate supervisor and/or the HR department who may, if the individual so requests, talk to the alleged offender on the individual's behalf. In addition, there may be instances in which an individual seeks only to discuss matters with one of the HR designated representatives, and such discussion is encouraged. An individual reporting harassment, discrimination or retaliation should be aware, though, that the School may decide it is necessary to take action to address such conduct beyond an informal discussion. This decision will be discussed with the individual. The best course of action in any case will depend on many factors and, therefore, the informal procedure will remain flexible. Moreover, the informal procedure is not a required first step for the reporting individual.

#### *b. Formal Procedure*

As noted above, individuals who believe they have been the victims of conduct prohibited by this policy statement or believe they have witnessed such conduct should discuss their concerns with their supervisor or the HR department. The School encourages the prompt reporting of complaints or concerns so that rapid and constructive 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. Any reported allegations of harassment, discrimination or retaliation will be investigated promptly and thoroughly. 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. Confidentiality will be maintained throughout the investigation process to the extent consistent with adequate investigation and appropriate corrective action. Misconduct constituting harassment, discrimination or retaliation will be dealt with appropriately. Responsive action may include, 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 the School believes appropriate under the circumstances.

#### 4. Retaliation

Employees will not be retaliated against for complaining or participating in an investigation. Retaliation against an individual for reporting harassment or discrimination or for participating in an investigation of a claim of harassment or discrimination 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.

#### 5. Conclusion

This policy was developed to ensure that all employees can work in an environment free from harassment, discrimination and retaliation. The School 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 any questions or concerns about these policies should talk with their supervisor or the HR department. 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 the School 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 and retaliation are intended to complement and further those policies, not to form the basis of an exception to them.

None of the procedures listed are intended to preclude an employee from pursuing claims of discrimination and/or harassment in any other forum available to the employee, including making reports of discrimination, harassment, and/or retaliation to the Department of Fair Employment and Housing and the U.S. Equal Employment Opportunity Commission.

## Section II: Employment Requirements

### A. Child Abuse and Neglect Reporting

Any employee who knows or reasonably suspects a child has been the victim of child abuse shall report the instance to a child protective agency. School employees are mandated reporters and are required to report instances of child abuse when the employee has a “reasonable suspicion” that child abuse has occurred. Reasonable suspicion arises when the facts surrounding the incident or suspicion could cause another person in the same situation to suspect child abuse.

Child abuse should be reported immediately by phone to a child protective agency or local law enforcement such as the police or sheriff’s department. Employees are advised to call the local Department of Family and Children’s Services (DFCS) to report child abuse and neglect. If there is a life-threatening emergency to a child however, call 9-1-1. The phone call to the DFCS is to be followed by a written report within 36 hours of receiving the information concerning the incident. There is no duty for the reporter to contact the child’s parents. In fact, if a child is released to a peace officer or a child protective agency agent, the reporter shall not notify the parent as required in other instances of removal.

Child abuse is broadly defined as “a physical injury that is inflicted by other than accidental means on a child by another person.” Child abuse can take the following several forms:

1. Sexual abuse: Sexual abuse means, in general, sexual assault or sexual exploitation. Sexual abuse does not include children who voluntarily engage in sexual activity with children of a similar age. Pregnancy of a minor does not, in and of itself, constitute suspicion of child abuse.
2. Neglect: Neglect occurs when a child’s custodian has failed to provide adequate “food, clothing, shelter, medical care, or supervision” that may or may not have resulted in any physical injury.
3. Unlawful corporal punishment: Unlawful corporal punishment occurs when

any person willfully harms or injures a child to such a degree that results in a traumatic condition.

4. Willful cruelty or unjustifiable punishment: Child abuse also includes the situation where any “person willfully causes or permits any child to suffer unjustifiable pain or mental suffering” or when any person endangers a child’s health.

### Confidentiality

A mandated reporter is required to give their name to DFCS. The identity of all persons who report shall be kept confidential by the School. Violation of statutory confidentiality is a misdemeanor. DFCS may reveal the names of reporting parties only to other investigative agencies as specified by law. No person required to report abuse will bear criminal liability for reporting. No supervisor or administrator may impede or prohibit reporting.

All employees, prior to commencing employment, are required to acknowledge the provisions of Penal Code Section 11166 regarding mandated reporting and will comply with those provisions as outlined in the employment agreement. All employees will also be subject to annual training as required by law.

### Failure to Report

Failure to report suspected abuse is a misdemeanor punishable by imprisonment/fine. Any person who fails to report an instance of child abuse or neglect as required by the Child Abuse and Neglect Reporting Act is guilty of a misdemeanor with a punishment not to exceed six months in jail or \$1,000 or both.

## B. Employee Access to Confidential Information

Each employee is responsible for safeguarding confidential information obtained during employment. In the course of the employee’s work, the employee may have access to confidential information regarding students, parents, suppliers, other customers, or perhaps even fellow employees without consent from that individual. The employee has the responsibility of preventing the revealing or divulging of any such information unless it is necessary for the employee to do so in the performance of their duties and in accordance with law. Access to confidential information should be on a "need-to-know" basis and must be authorized by the CEO or designee. Any breach of this policy will not be tolerated and will lead to disciplinary action and possible legal action.

Please note the release of unauthorized confidential information may result in immediate dismissal and the filing of criminal charges. Confidentiality of student information is a requirement of the law and great care must be taken to ensure it is

protected. No student information will be released without the specific authorization of the CEO or designee. Employee information may be released as part of a Public Records Act request, for the purpose of employment verification with prior written approval by the employee, or as required by law.

## C. Student Data/FERPA

All information contained in a student's records, including information contained in an electronic database, is confidential and maintained in accordance with the Family Educational Rights and Privacy Act (FERPA). These records are the property of the School, whose responsibility it is to secure the information against loss, defacement, tampering or use by unauthorized persons. Staff is prohibited from discussing students' academic or personal information outside the scope of performing the duties of one's position. No student's files are to be taken off premises unless granted permission by the CEO or designee. Only teachers, administrative, and office personnel are permitted to review student's files. When a file is requested from the School office, it must be signed out and returned the same day. No student files, records, forms, communication or reports may be copied without express authorization from the CEO or designee. Under no circumstances may student information be used for an employee's personal use.

Employees may not remove any materials from any student's file. Files may not leave the office building without specific written authorization from the CEO or designee. Employees who access student files are responsible to secure their contents and maintain confidentiality.

## D. Conflict of Interest

Employees have an obligation to conduct business within guidelines that prohibit actual or potential conflict of interest. Such a conflict occurs when an employee is in a position to influence a decision that may result in a personal gain for the employee or for a relative as a result of the School's business dealings.

### 1. Personal Financial Interest

All such persons shall be neither personally nor financially interested in any contract made by them or by the school that employs them. For purposes of this policy,

(1) "Personally interested" shall mean any situation where private and/or personal interests conflict with official duties and shall include non-economic interests such as familial relationships.

(2) "Financially interested" shall mean any contract with an individual, entity, or company in which any such person related by blood, marriage or civil partner; any other person with a close personal relationship to any such person who has an

ownership interest, an investment interest, or a familial interest, and encompasses any situation where any such person's official judgment may be influenced by personal consideration or expectation of financial gain or any compensation or consideration of any kind other than that officially provided to any such person by the School.

## 2. Statement of Economic Interest (Form 700)

Board members and staff who make or influence governmental decisions or financial decisions of the organization are designated in the Conflict of Interest Code adopted by the Board of Directors. These individuals must complete and file a Statement of Economic Interest, Form 700. The Form 700 ensures transparency and accountability in alignment with the Political Reform Act.

It is the policy of this School that elected or appointed school governance body members, school administrative officers, and school employees shall not place themselves in any position where their private or personal interests may conflict with their official duties, or where they may directly or indirectly receive personal financial gain through direct or indirect personal influence.

## 3. Personal Relationship

Personal or romantic involvement with a competitor, supplier or employee of the School may create an actual or potential conflict of interest. Management-subordinate romantic or personal relationships can lead to issues such as claims of discrimination or favoritism, issues with performance evaluation, possible claims of sexual harassment, and morale issues. It is the responsibility of the employees involved in romantic or personal relationships with subordinates, or other personal or romantic relationships that give rise to a conflict of interest, to disclose and discuss all relevant circumstances with the supervisor or HR and possibly request a change in assignment to avoid potential problems as appropriate. Failure to disclose such circumstances may cause the School to impose disciplinary action. Moreover, any romantic or personal relationships between employees must not harm the work environment in any way. Regardless of an employee's relationship with another employee outside of work, employees are expected to remain professional at all times during work hours. The School will not discriminate on the basis of marital or relationship status, except that the School may reasonably regulate the working of spouses or relatives in the same department, division, or facility for reasons of supervision, safety, security, or morale in accordance with applicable law.

No "presumption of guilt" is created by the mere existence of a professional or personal relationship with outside firms; however, if such employees have any influence on transactions involving purchases, contracts, or leases, it is imperative that such be disclosed so that safeguards can be established to protect all parties.



## E. Anti-Nepotism Policy

The School recognizes there may be situations in which spouses or other relatives may be employed by the School at the same time. The School permits the employment of qualified family members, domestic partners, significant others and/or similar personal relationships of employees as long as such employment does not create a conflict of interest. Relationships by family, marriage, domestic partnership and/or similar personal relationship shall constitute neither an advantage nor a disadvantage to selection, promotion, salary, or other conditions of employment. The School may consider a member of an employee's immediate family for employment if the applicant possesses the qualifications for employment for the position.

The School does not prohibit the employment of relatives in the same department. However, the School does prohibit any preferential treatment toward spouses or relatives or an improper influence impacting a spouse's or relative's terms or conditions of employment. The School recognizes that at times, employees and their family members, domestic partners, significant others and/or personal relationships may be assigned to positions that create a coworker or supervisor-subordinate relationship. The School will, in its discretion, exercise sound judgment with respect to the placement of employees in these situations in order to avoid the creation or appearance of a conflict of interest, avoid favoritism or the appearance of favoritism, and decrease the likelihood of harassment in the workplace.

Employees should neither initiate nor participate, directly or indirectly, in employment actions (initial employment or appointment, retention, evaluation, promotions, salary, work assignments, leave of absence, etc.) involving family members, domestic partners, significant others and/or similar personal relationships.

The School will make reasonable efforts to assign job duties to minimize the potential for creating conflicts of interest. Notwithstanding the above, the School retains the right where such placement has the potential for creating conflicts of interest, to refuse to place immediate family members in the same department. The School retains the right to reassign or transfer any person to eliminate the potential for creating conflicts of interest.

Any potential preferential treatment or improper influence should be reported immediately to HR.

## F. Employment Eligibility Verification Document

The School will only employ individuals who are authorized to work in the United States in compliance with the Immigration Reform and Control Act of 1986.

All newly hired employees must complete, as a condition of employment, the

Employment Eligibility Verification Form I-9 and provide documentation establishing identity and proof of work eligibility and identification at time of hire, but no later than three (3) days of hire. If the employee is unable to produce the required documentation or a receipt/letter requesting appropriate documentation within three days, the employee will be dismissed from employment. If, after 90 days of hire, the employee has not submitted the original documents to replace the receipt/letter or, in the meantime, some other acceptable document(s), the employee will be dismissed from employment.

Former employees who are rehired must also complete the form if they have not completed an I-9 for the School within the past three years or if their previous I-9 is no longer retained or valid.

## G. Fingerprinting

Each employee will be fingerprinted in conformance with legal requirements and as a condition of employment. Fingerprints are submitted to the appropriate State and Federal agencies for screening to assure that no employee has been convicted of a crime that would preclude employment by the School.

## H. Criminal Background Checks

As a condition of employment, all employees are required to submit to a criminal history review through the Department of Justice. The review shall include a fingerprint submission to the DOJ. The School follows the guidelines of the California Fair Chance Act, and will conduct an individualized assessment on all background check results. The School will make hiring determinations based on California law. Certain types of criminal background findings may prevent the employer from hiring the candidate or continuing employment with a current employee. The School will factor in the nature and gravity of the crime, when the crime occurred, rehabilitation and the nature of the position all in accordance with applicable law. All results will be discussed with the applicant and/or employee before making a hiring or dismissal decision. No person employed or otherwise associated with the School, including members of the Board of Directors, who have been convicted of or have pleaded nolo contendere to a crime related to misappropriation of funds or theft shall be engaged in direct processing of charter school funds.

## I. Employment Application/Data

The School relies upon the accuracy of the information presented during the application process, as well as the accuracy of other data presented throughout the hiring process and employment relationship. As such, any omission or misstatement of material fact in any of this information may result in the School excluding the individual from further consideration for employment or, if already hired,



termination of employment.

## J. Employment Verifications

The School will only respond to employment verification inquiries that are received in writing. All such inquiries, whether for current or former employees, must be directed to HR. Generally, responses will be limited to information concerning wages, employment dates, positions held, and eligibility for rehire. Release of any additional information will require that the employee execute a release. Letters of recommendation must be approved by HR to ensure the accuracy and appropriateness of the information being released.

## K. Certification and Licensing

Teachers are required to hold a current California Commission on Teacher Credentialing certificate, permit, or other commission approved document for the assignment held ("Certificated Employee"). In addition, teachers serving students identified as English Language (EL) Learners must possess the proper EL authorization.

It is the responsibility of each certificated employee to ensure that credentials and permits are renewed in a timely manner and remain current. The School highly encourages all certificated staff to keep their contact information current with the Commission on Teacher Credentialing in order to receive pertinent notifications. Upon renewal of credentials or certificates, proof is to be submitted to the HR department to be copied and filed in the employee's personnel file.

## L. Mandatory Tuberculosis Testing

In order to ensure the health and safety of all students and staff of the School, all newly hired employees must submit proof of a negative TB Risk Assessment or TB test by a licensed healthcare provider that has been administered within sixty (60) days prior to hire. A TB test may include an intradermal skin test or an X-ray of the lungs. An individual hired from another California School may request their prior school provide proof of the individual's TB Risk Assessment or TB test. TB Risk Assessments and TB tests are considered expired after four (4) years from the date they are administered and a proof of a new assessment or test must be submitted to HR in order to continue in employment. Pregnant employees are exempt from providing proof of a TB test for at least sixty (60) days from the end of their pregnancy.

The School will reimburse the cost of the tuberculosis risk assessment and/or the test for all current employees with proof of receipt.

[See also Board Policy 4013]

## Section III: Standards of Conduct

The School expects all employees to comply with School rules, policies, and regulations as set forth in this handbook. Any employee who fails to do so will be subject to disciplinary action at the School's sole discretion, which management deems appropriate under the circumstances. Such disciplinary action may include, but is not limited to, oral and written warnings, mandatory training, or termination of employment. Any employee's receipt of, participation in or completion of School-required disciplinary action shall not, under any circumstances, limit or alter the School's at-will employment policy, which allows either the School or the employee to terminate the employment relationship at any time, with or without notice, and with or without cause.

### A. Freedom from Violence

The School expressly prohibits any acts or threats of violence by any School employee or former employee against any other individual. The School will also not condone any acts or threats of violence against school employees, students or affiliates while engaged in business with or on behalf of the School.

To ensure that the School's objective in this regard is attained, it is the commitment of the School:

1. To provide a safe and healthful work environment, in accordance with the School's safety and health policy.
2. To take prompt remedial action up to and including immediate termination, against any employee who engages in any threatening behavior or acts of violence or who uses any obscene, abusive, or threatening language or gestures.
3. To take appropriate action when dealing with customers, former employees, or visitors to school functions who engage in such behavior. Such action may include notifying the police or other law enforcement personnel and prosecuting violators of this policy to the maximum extent of the law.
4. To prohibit employees, former employees, students, and visitors from bringing unauthorized firearms or other weapons to school, work and non-work related gatherings, meetings and functions.
5. To establish viable security measures to ensure that school meetings and gatherings are safe and secure to the extent possible and to properly handle access to school facilities by the public, off-duty employees, and former employees.

The School will not tolerate any type of workplace violence committed by or against

its employees. Employees who violate this policy will be subject to disciplinary action, up to and including discharge. Prohibited conduct includes, but is not limited to:

1. Causing physical injury to another person.
2. Making threatening remarks.
3. Aggressive or hostile behavior that creates a reasonable fear of injury to another person or subjects another person to emotional distress.
4. Possession or threat of using a weapon on the premises and/or at work related events, meetings and gatherings.

Employees who display a tendency to engage in violent, abusive, or threatening behavior, as determined by the School, in its sole discretion, may be referred for counseling or other appropriate treatment.

In furtherance of this policy, employees have a “duty to warn” their supervisors or a HR representative of any suspicious workplace activity or situations or incidents that they observe or that they are aware of that involve other employees, former employees, customers, or visitors and that appear problematic. The welfare of all employees depends upon the alertness and sensitivity of every individual to potential security risks. Employee reports made pursuant to this policy will be held in confidence to the extent possible. The School will not condone any form of retaliation against any employee for making a report under this policy.

The School has developed guidelines to help maintain a secure workplace.

1. Every employee is directed to report any suspicious persons or activities to the CEO or designee:
  - a. Such as persons loitering for no apparent reason in parking areas, walkways, entrances and exits, and service areas.
  - b. Persons who make threats or acts of violence, aggressive behavior, offensive acts, discussion of bringing weapons into the workplace, threatening or offensive comments or remarks, and the like.
2. Employees should immediately notify the CEO or designee when other employees or outsiders express anger and make threats against the School or behave in a manner suggesting the possibility of violent activity.
3. Finally, those working in the School’s office must also ensure that doors are locked and alarms are activated when applicable.

## B. Prohibited Conduct

Employees are expected to conduct themselves in a manner to further the School's objectives.

The following conduct is prohibited and will not be tolerated by the School. This list of prohibited conduct is illustrative only; other types of conduct that threaten security, personal safety, employee welfare and School operations may also be prohibited and will result in disciplinary action up to and including termination.

1. Falsifying employment records, employment information, or other School records;
2. Inefficient or careless performance of job responsibilities or inability to perform job duties satisfactorily;
3. Falsifying any timesheet - recording the work time of another employee or allowing any other employee to record another employee's work time, either one's own or another employee's;
4. Theft and deliberate or careless damage or destruction of any School property, or the property of any employee or customer;
5. Removing or borrowing School property without prior authorization;
6. Unauthorized use or misuse of School equipment, time, materials, or facilities;
7. Provoking a fight or fighting during working hours or on School property;
8. Participating in horseplay or practical jokes on School time or on School premises;
9. Carrying firearms or any other dangerous weapons on School premises at any time;
10. Engaging in criminal conduct whether or not related to job performance;
11. Causing, creating, or participating in a disruption of any kind during working hours on School property;
12. Insubordination, including but not limited to failure or refusal to obey the orders or instructions of a supervisor or member of management, or the use of abusive or threatening language toward a colleague;
13. Using abusive, threatening or intimidating language at any time on School premises;
14. Initiating or participating in gossip or slander of other employees, parents, or students;
15. Failing to notify a supervisor when unable to report to work;
16. Unreported absence of three (3) days;
17. Failing to obtain permission to leave work for any reason during normal working hours;
18. Failing to observe working schedules, including rest breaks and meal periods;
19. Failing to provide a physician's certificate when requested or required to do so;
20. Sleeping or malingering on the job;
21. Making or accepting personal phone calls, text or email messages during working hours to the extent that it interferes with the performance expectations of the assignment, except in cases of emergency or extreme circumstances;
22. Working overtime without authorization or refusing to work assigned

- overtime;
- 23. Violation of dress standards;
- 24. Violating any safety, health, security or School policy, rule, procedure or violation of the School's drug and alcohol policy;
- 25. Committing a fraudulent act or a breach of trust under any circumstances;
- 26. Committing or involvement in any act of unlawful harassment of another individual;
- 27. Failing to promptly report work-related injury or illness;
- 28. Any other action or behavior, which could harm the School's, parents', or students' interest.

This statement of prohibited conduct does not alter the School's policy of at-will employment. Either the employee or the School remains free to terminate the employment relationship at any time, with or without reason or advance notice.

## C. Physical Contact with Students and Other Staff Members

It is the policy of the School that no staff member will use corporal punishment against a student. This prohibition includes: spanking, slapping, pinching, hitting or the use of any other physical force as retaliation or correction for inappropriate behavior. While the use of appropriate touching is part of daily life and is important for student development, a teacher and staff member must ensure that they do not exceed appropriate behavior. If a child or other staff member specifically requests that the individual not be touched, then that request must be honored without question.

The following forms of touching are never appropriate:

1. Sexually motivated physical conduct or touching
2. Angry or violently motivated touching
3. Inappropriate or lengthy embraces
4. Kissing of any kind
5. Corporal punishment
6. Sitting student on one's lap
7. Touching buttocks, chests or genital areas
8. Pushing a person or another person's body part
9. Showing affection in isolated areas
10. Wrestling with students or other staff members
11. Bench-pressing another person
12. Tickling
13. Piggyback rides
14. Massages

15. Any form of unwanted affection
16. Any form of sexual contact
17. Poking fingers at another person that results in an offensive contact
18. Having a student in an employee's vehicle or transporting a student
19. Intentionally being alone with a student
20. Any touching that would lead a responsible person to suspect inappropriate behavior.

For additional examples of unacceptable and acceptable Staff/Student Behaviors, see the School's Professional Boundaries Policy.

Restraining a child who is trying to engage in violent or inappropriate behavior may be permitted. Only such force as necessary to defend one's self or another or to protect property is legally allowed. Excessive force is prohibited. Violation of this policy could subject the teacher or staff member to discipline to include termination for cause. Additionally, the victim may choose to bring civil or criminal charges against the violator.

When interacting with younger children or children with a disability, an appropriate physical touch may sometimes be necessary. A touch for the purpose of redirecting or refocusing, assisting with physical care (i.e. cleaning up a small child after a bathroom accident) may be appropriate in limited circumstances although clearly inappropriate in more general circumstances.

It is impossible to define each and every instance when touching is inappropriate. Employees must use professional judgment and discretion related to physical touch.

This policy does not prevent appropriate forms of touching a student, including for the purpose of guiding them along a physical path, helping them up after a fall, engaging in a rescue or the application of Cardiopulmonary Resuscitation (CPR) or other emergency first-aid. Nor does it prohibit the use of reasonable force and touching in self-defense or in the defense of another.

## D. Off-duty Conduct

While the School does not seek to interfere with the off-duty and personal conduct of its employees, certain types of off-duty conduct may interfere with the School's legitimate business interests. For this reason, employees are expected to conduct their personal affairs in a manner that does not adversely affect the School's or their own integrity, reputation, or credibility. Illegal or immoral off-duty conduct by an employee that adversely affects the School's legitimate business interests or the employee's ability to perform their job may result in disciplinary action and/or dismissal as allowed by law.

## E. Drug and Alcohol Free Workplace and Awareness Program

The School will comply with all federal and state regulations regarding drug and alcohol use while employees are on the job. This policy covers all School employees and violation of the School's policy related to drug use is grounds for immediate termination. The School is concerned about the use of alcohol, illegal drugs and controlled substances as it affects the workplace, the School community, and students. Though marijuana is legal in many California cities, it is still considered an illegal substance under Federal law and therefore considered an illegal substance for this policy. Use of these substances whether on or off the job can adversely affect an employee's work performance, efficiency, safety, and health and therefore seriously impair the employee's value to the School and its students. In addition, the use or possession of these substances on the job constitutes a potential danger to the welfare and safety of other employees and students and exposes the School to the risks of property loss or damage or injury to other persons. The unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the workplace.

Conduct against this policy includes, but is not limited to, the following:

1. Driving a School vehicle, or a vehicle designated for school business, while under the influence of alcohol or an illegal or controlled substance;
2. Selling or purchasing an illegal or controlled substance, including while on the job, on school property, or in the presence of students;
3. Possessing or using alcohol or an illegal or controlled substance while on the job, on school property, or in the presence of students,
4. Under the influence of alcohol or an illegal or controlled substance while on the job, on school property, or in the presence of students.

The School will provide information to employees about:

1. The dangers of drug abuse in the workplace;
2. The policy of maintaining a drug-free workplace;
3. Any available drug counseling, rehabilitation, and assistance programs; and
4. The penalties that the School may impose upon them for drug abuse violations occurring in the workplace.

Violation of these rules and standards of conduct will not be tolerated and may result in disciplinary action, up to and including termination of employment. The School may also bring the matter to the attention of appropriate law enforcement authorities. The School may terminate an employee who is convicted of a controlled substance offense to the extent allowed by law. Alternatively, the School may, as required or allowed in accordance with applicable law, require the employee to participate satisfactorily in a drug abuse assistance or rehabilitation program



approved for these purposes by a Federal, State or local health, law enforcement, or other appropriate agency.

As a condition of employment, employees are required to notify the School in writing of any conviction for a violation of a criminal drug statute. Such notification must be made no more than five (5) calendar days after the conviction. The School may, as required by applicable law, notify federal or state agencies of any applicable employee convictions if such a report is required by law.

The School will provide reasonable accommodation to an employee who voluntarily requests an accommodation or leave of absence to voluntarily participate in a drug or alcohol rehabilitation program. Please note that the request must be made before the employer learns of a violation of the Drug and Alcohol Free Workplace policy. Any employee who participates in a rehabilitation program would still be responsible for following all other School policies. Employees returning from a voluntary rehabilitation program will be required to comply with a return-to-work agreement addressing the terms and conditions of continued employment.

In order to enforce this policy, the School reserves the right to conduct legal searches of school property and to implement other measures, which are in accordance with law and necessary to deter and detect violation of this policy. As a condition of employment, the employee agrees to abide by the terms of this policy.

The School will abide by all relevant laws, including laws regarding employee disability and reasonable accommodations in implementing this policy.

## F. Tobacco Free Workplace

The School is a tobacco free workplace. No tobacco products are to be used in the workplace or at work functions. This includes all vape and e-cigarette products. Additionally, employees are required to adhere to any building and site policies regarding designated areas for smoking.

## G. Punctuality and Attendance

Employee punctuality and consistent attendance contributes to the positive operations of the School. As such, attendance and punctuality are performance expectations and are measured on the overall job performance. Employee tardiness or chronic absenteeism causes unnecessary problems for students and fellow employees. While an employee is absent, other employees may be burdened with performing additional duties in order to maintain operations. Further, employees are expected to report to the workplace and be prepared to begin work at their scheduled reporting times. To avoid conflict with the daily operations of the School, employees should schedule personal affairs outside of regular working hours.



Employees who work remotely are required to ensure a stable internet connection and participation in school duties free from personal or environmental distractions.

If an employee is unable to report for work on any particular day, they must call their supervisor or HR at least one hour before the time they were scheduled to begin working on that day in order to obtain pre-approval for the absence. An employee may be excused from this one hour notice requirement if extenuating circumstances prevented them from contacting the supervisor. In all cases of absence or tardiness, employees must provide the School with an honest reason or explanation.

Employees must inform HR or designee of the expected duration of any absence. Excessive absences, lateness or failure to give the supervisor advance notice for absence or lateness can result in disciplinary action or dismissal from employment. Excessive absenteeism or tardiness, whether excused or not, will not be tolerated.

If the employee fails to report for work without any notification to their supervisor or to HR, and the absence continues for a period of three days, the School will consider it a voluntary resignation unless a written medical excuse is provided by a physician to confirm that the employee has not abandoned their employment.

Employees with emergencies or situations that do not allow them to do their job, must inform their supervisor or HR within 24 hours. Failure to return phone calls or emails within 24 hours during workdays requires an explanation to the employee's supervisor. Failure to inform a supervisor of an expected absence, failure to return phone calls or emails for three (3) work days without notice, and missing required deadlines or meetings constitutes abandonment of employment and voluntary resignation from CalPac.

Please refer to the policies related to leaves of absence and paid sick days in the handbook for more information.

## H. Professionalism

The success of the School depends upon the quality of the relationships between the School, its employees, students, parents and the general public. The public impression of the School and its interest will be formed, in part, by their interactions with employees. The more goodwill an employee promotes, the more employees, students, parents and the general public will respect and appreciate the employee, the School, and the Schools' services.

Employees are encouraged to help make a good impression of the School by:

1. Communicating regularly.

2. Acting competently and dealing with others in a courteous and respectful manner.
3. Communicating pleasantly and respectfully with others at all times.
4. Following up on requests and questions promptly, providing professional replies to inquiries and requests.
5. Responding to email and voicemail within 24 business hours, or within a reasonable period of time depending on the assignment (employees should discuss this with their supervisor).
6. Taking pride in performing duties in an exceptional manner.

Employees may not bring their own children to school events (learning period meetings, assessments, school meetings, etc.) unless they are a student participant in the events or it is a general school event open to all students or employee families. The CEO or designee may grant an exception.

## I. Dress Code

Each employee is a representative of the School in the eyes of the public. Therefore, each employee must report to work properly groomed and dressed in professional attire in a manner consistent with the nature of the work performed. Employees who report to work inappropriately dressed may be asked to clock out and return in acceptable attire.

Violation of the dress code is determined by the CEO or designee. The CEO or designee may issue more specific dress code guidelines at any time, which shall be in accordance with law. The standards of grooming and hygiene outlined below set the minimum requirements to which all employees, contract workers, and temporary staff are required to adhere.

Employee dress is described as business casual, which includes:

- Slacks, dockers and other office style pants,
- Skirts and dresses to or below the knee,
- Button down shirts, blouses, and sweaters.
- All clothes are to appear clean, pressed and without stains or holes.

Inappropriate attire:

- Spaghetti straps or strapless tops,
- Overly baggy or tight so as to be revealing,
- Plunging necklines, midriff revealing tops, or any clothing that is exposes the employee inappropriately,
- Clothing with offensive words or pictures,
- Any clothing that is overly casual (shorts, tank tops, athletic wear), appears dirty, wrinkled, or has stains or holes.

Overall grooming – Grooming standards for everyone includes the appearance of care and proper hygiene. Hair, makeup, and jewelry may not interfere with an employee’s ability to perform the job duties or pose a safety issue. Facial piercings should be removed and tattoos should be covered during work hours. Excessive piercings or offensive tattoos may prohibit an individual from being considered for a customer facing assignment. The School reserves the right to ask any employee to cover inappropriate tattoos or remove any piercings that are not reflective of the school culture.

Exceptions – The School recognizes some events as acceptable for casual dress. The majority of the same dress and grooming standards apply, however employees may wear jeans, seasonally appropriate clothing, and more casual shoes.

Requests for an exception to the dress code policy for religious beliefs or practices must be addressed to the CEO or designee or an HR representative. Each request will be evaluated on a case-by-case basis.

Supervisors are expected to inform employees when they are violating the dress code. Employees in violation are expected to immediately correct the issue. This may include having to leave work to change clothes. Repeated violations or violations that have major repercussions may result in disciplinary action being taken up to and including termination.

## J. Gifts to Employees

It is the policy of the School that no employee may accept any gift from an outside party, client, contractor, vendor, community provider, business associate, parent or student that is of such nature that it could affect their impartiality with regard to decisions or actions affecting school operations. Gifts with a value of less than \$50 are excluded from this policy.

## K. Fee and Cash Collection

No staff member, other than specifically authorized individuals, is permitted to accept cash and/or checks. All school events, for which money is collected, must be approved by the CEO or designee who will supervise the collection of all fees and will be responsible for managing the receipts. Cash and/or checks should not be stored or locked in staff offices or desks. All financial transactions should be coordinated with the CEO or designee. Employees must obtain approval from the CEO prior to soliciting staff for donations or financial support for any outside event/activity.

## L. Building Security

Building security is the responsibility of all staff. The last employee, or a designated employee, who leaves the office at the end of the business day assumes the responsibility to ensure that the office is secure; for example, all doors are securely locked, the alarm system is armed, thermostats are set on appropriate evening and/or weekend setting, and all the appliances and lights are turned off with the exception of the lights normally left on for security purposes. Employees are not allowed on properties or leased facilities after hours without prior authorization from the CEO or designee. All employees who are issued keys to the office are responsible for their safekeeping and will sign for receipt of such key.

## Section IV: Personnel Policies and Procedures

The School will continually strive to recruit and retain highly qualified employees and remain a competitive public school employer, including examining employee evaluation, compensation, and discipline/dismissal practices periodically.

### A. New Employee Orientation

Orientation is a formal welcoming process that is designed to make the new employee feel comfortable, informed about the School, and prepared for their position. New employee orientation, includes an explanation of the core values, vision, mission, goals, and objectives of the School. In addition, the new employee will be given an overview of benefits and complete any necessary paperwork through the HR department.

### B. Employee Status

The School designates all employees as either exempt or nonexempt in compliance with applicable federal, state, and local law:

- **Exempt:** Employees whose positions meet specific criteria established by the Fair Labor Standards Act (FLSA) and who are exempt from overtime pay requirements.
- **Nonexempt:** Employees whose positions do not meet FLSA criteria and who are paid one and one-half their regular rate of pay for hours worked in excess of 40 hours per week. Nonexempt employees are also subject to meal period and rest break regulations.

The School also assigns each employee to one of the following categories:

- **Regular Full-time:** Employees who are regularly scheduled to work 30 or more hours per week. Generally, full time employees are eligible for the School benefit package, subject to the terms, conditions, and limitations of each benefit program. Full-time status will be evaluated on a monthly basis.
- **Regular Part-Time Employees (Tier 1).** Regular part-time employees are normally scheduled to work 24 -31.9 hours per workweek. Part-time

employees are eligible for benefits as outlined in the handbook.

- **Non-Regular Employees. (Hourly/Temporary/Seasonal)** Hourly employees work less than 24 hours per week. Temporary employees are generally hired on a temporary or project-specific basis, with either full- or part-time hours. Seasonal employees are hired on a temporary basis during a time of year when extra work is available. Hourly/temporary/seasonal employees are not eligible for most School benefits.

You will be informed of your classification, status, and responsibilities at the time of hire and at any time your classification, status, or responsibilities change. If you have a question regarding this information, contact your supervisor or Human Resources. These classifications do not alter your employment at-will status.

Employee Status	Exempt	NonExempt (hours per week)	Benefit Tier
Regular Full Time	.80+ FTE	32+ hours	Tier 2
Regular Part Time	.60-.79 FTE	24-31 hours	Tier 1
Non-Regular (Hourly/Temporary/Seasonal)	.59 FTE or less	Less than 24 hours/week	Not eligible

### Student Counts

The teacher may indicate their desired student count with the School as a request. The leadership team will review the request to determine if an accommodation can be made. Final determination of student roster count will be made based on the needs of the School.

## C. Job Duties

The assigned supervisor will clarify the job duties and the expectations for behavior and job performance. The employee's job responsibilities and tasks are subject to change and update during employment as stated in the at-will employment agreement and job description. On occasion, the employee may be asked to work on projects, or to help with other work necessary or important to the operation of their department or the School. The employee's cooperation and assistance in performing such additional work is expected. The School reserves the right, at any time, with or without notice, to alter or change job responsibilities, reassign or transfer any employee's job positions, or assign additional job responsibilities.

If you have any questions regarding your job description or the scope of your duties, please speak with the Director of Human Resources.

## D. Nonexempt Employees

### 1. Work Schedules

The School's business hours and employee work schedule shall be established by the CEO or designee. The CEO or designee will assign the staff's individual work schedule to ensure appropriate staffing throughout the workday to serve the business functions of the School. Employees are expected to be at their workstations at the start of their scheduled shifts, ready to work, free from personal or environmental distractions.

Employees may not work outside of their work schedule without the preapproval of their supervisor. Failure to obtain preapproval before working outside of the work schedule may subject the employee to disciplinary action up to and including termination. Work schedule exchanges will be reviewed on a case by case basis as long as the exchange does not interfere with normal operations or result in excessive overtime. Exchanging work schedules with other employees may be authorized by the supervisor or their designee when necessary.

The workweek begins at 12:01 a.m. Monday and ends at midnight on Sunday.

### 2. Rest Breaks and Meal Periods

#### *a. Rest Breaks*

Rest breaks are on the clock and duty-free. Employees are expected to return to work promptly at the end of any rest breaks.

#### *b. Number of Rest Breaks*

Nonexempt employees are provided one (1) paid ten-minute rest break for every four (4) hours worked (or major fraction thereof, which is defined as any amount of time over two (2) hours). A rest break is not authorized for employees whose total daily work time is less than three and one half (3.5) hours.

If the employee works a shift from three and one-half (3.5) to six (6) hours in length, they will be entitled to one (1) paid ten-minute rest break. If they work more than six (6) hours and up to 10 hours, they will be entitled to two (2) paid ten-minute rest breaks. If the employee works more than 10 hours and up to 14 hours, they will be entitled to three (3) paid ten-minute rest breaks.

#### *c. Timing of Rest Breaks*

The employee is authorized and permitted to take a rest break in the middle of each four-hour work period. There may be practical considerations that make this general timing infeasible and that require the School to deviate from this general rule. The employee will be informed if there are practical considerations that make this timing infeasible. In the event of these considerations, the immediate supervisor may need

to schedule the rest breaks.

*d. Meal Period*

All nonexempt employees will be provided an uninterrupted unpaid meal period of at least 30 minutes if working more than five (5) hours in a workday. The employee must clock out for the meal period and will be permitted a reasonable opportunity to take this meal period. During the meal period, the employee is relieved of all duty and is free to leave the premises. The employee is expected to return to work promptly at the end of the meal period.

If the total work period for the day is more than five (5) hours per day, but no more than six (6) hours, the meal period may be waived. This cannot be done without the mutual consent of the employee and HR. Any such waiver must be requested and approved with HR and supervisor in advance.

*e. Timing of Meal Period*

As with rest breaks, the employee is authorized and permitted to take a meal period.

The meal period will be provided no later than the end of the fifth hour of work. For example, if work begins at 8:00 a.m., the meal period must begin by 12:59 p.m. (which is four hours and 59 minutes into the shift).

There may be practical considerations that make this general timing infeasible and that require the School to deviate from this general rule. The immediate supervisor may need to schedule the timing of an employee's meal period to ensure efficient business operations.

*f. Second Meal Period*

If the employee works more than 10 hours in a day, they will be provided a second, unpaid meal period of at least 30 minutes. Again, the employee must clock out for the meal period and will be permitted a reasonable opportunity to take this meal period; the employee will be relieved of all duty. During the meal period, the employee is relieved of all duty and is free to leave the premises. The employee is expected to return to work promptly at the end of the meal period.

Depending on the circumstances, the employee may be able to waive the second meal period if the first meal period was taken and if the total hours worked for the day is no more than twelve hours. This cannot be done without the mutual consent of the employee and HR. Any such waiver must be requested and approved with HR and supervisor in advance.



*g. Timing of Second Meal Period*

As with rest breaks, the employee is authorized and permitted to take a meal period. A second meal period is required if the employee's hours exceed 10 hours in one workday.

This second meal period will be provided no later than the end of the 10th hour of work. For example, if work begins at 8:00 a.m., the employee must start the second meal period by 5:59 p.m. (which is 9 hours and 59 minutes into the shift).

There may be practical considerations that make this general timing infeasible and that require the School to deviate from this general rule. The immediate supervisor may need to schedule the timing of an employee's meal period to ensure business operations.

*h. Recording Time*

California Pacific Charter Schools is required by applicable federal, state, and local laws to keep accurate records of hours worked by certain employees. To ensure that the School has complete and accurate time records and that employees are paid for all hours worked, nonexempt employees are required to record all working time using the School's timekeeping application. The Payroll department will provide staff with specific instructions for using the online system.

You must accurately record all of your time to ensure you are paid for all hours worked, and must follow established School procedures for recording your hours worked. Time must be recorded as follows:

- Immediately before starting your shift.
- Immediately after finishing work, before your meal period.
- Immediately before resuming work, after your meal period.
- Immediately after finishing work.
- Immediately before and after any other time away from work.

Employees are required to clock in no more than five minutes before their start time and clock out no later than five minutes after the end of their shift.

Notify your supervisor or payroll of any pay discrepancies, unrecorded or misrecorded work hours, or any involuntarily missed meal or rest break periods.

*i. Missed Rest Breaks and Meal Periods*

If for any reason the employee is not provided a rest break or meal period in



accordance with the policy, or if they are in any way discouraged or impeded from taking their rest break or meal period, or from taking the full amount of time allotted to them, the employee may be eligible for a missed rest break or meal period remedy and should immediately notify HR.

Anytime the employee misses a rest break or meal period that was provided to them (or they work any portion of a provided meal period), they will be required to report the time to their supervisor and payroll and document the reason for the missed rest break and meal period.

### 3. Timekeeping

All nonexempt employees are required to record time worked for payroll purposes. Employees must record their own time at the start and at the end of each work period, including before and after the meal period. Altering with this procedure in any way is not permissible and is subject to disciplinary action. Final timesheets in the payroll system are to be approved by the employee and the supervisor at the end of each pay period. Any errors on the timesheet should be reported immediately to HR. Employees with consistent patterns of not following time recording responsibilities are subject to disciplinary actions.

All communication between the nonexempt employee and management concerning work related issues is not permitted after hours. Once the nonexempt employee has recorded the end of a work period at the end of the day, that employee is no longer clocked in. All work related correspondence will resume the next workday except in the case of an emergency or at the direction of the supervisor. Nonexempt employees will be compensated at the appropriate rate of pay for any additional time worked outside of their workday.

### 4. Pay for Mandatory Meetings/Training

The School will pay nonexempt employees for attendance at meetings, lectures, and training programs when attendance is mandatory, and the meeting, course, or lecture is directly related to the job and is outside of the regular schedule. Unless otherwise noted, trainings and meetings are included as part of an exempt employee's regular pay.

### 5. Overtime

All overtime work must be requested in advance by the employee and authorized by the supervisor prior to the time to be worked. Nonexempt employees may be directed to work overtime as necessary. Only actual hours worked each workday or workweek can apply in calculating overtime. The School provides compensation for all overtime hours worked by nonexempt employees in accordance with state and federal law. All hours worked in excess of eight (8) hours in one workday or 40

hours in one workweek will be treated as overtime. A workday begins at 12:01 a.m. and ends at midnight 24 hours later. The work week begins at 12:01 a.m. Monday and ends at midnight on Sunday.

Compensation for hours in excess of 40 hours for the workweek, or in excess of eight (8) hours and not more than 12 hours for the workday, and for the first eight hours on the seventh consecutive day of work in one workweek, shall be paid at a rate of one-and-one-half times the employee's regular rate of pay. Compensation for hours in excess of 12 hours in one workday and in excess of eight (8) hours on the seventh consecutive workday in a workweek shall be paid at double the regular rate of pay.

## E. Exempt Employees

The School will pay exempt employees a salary rather than by the hour. Once an employee's sick days and vacation have been exhausted or are otherwise unavailable, the School will deduct pay from an exempt employee's salary under the following circumstances: (i) one or more full days absences for personal reasons; (ii) one or more full day absences for illness, injury, or sickness, (iii) one or more full work weeks disciplinary suspensions; and (iv) partial (for intermittent leave) or full day absences during an approved family or medical leave in accordance with law.

Exempt employees who believe that the School made an incorrect or improper salary deduction should promptly report the deduction to their supervisor or the HR department. If the School incorrectly or improperly made a deduction from an exempt employee's salary, it will reimburse the employee for the deducted pay as soon as possible.

## F. Salary Overpayments

Because the School receives public funds, the School is obligated by law to seek reimbursement for any salary overpayment and cannot waive the recovery of the overpayment. Employees who receive excess pay as a result of a payroll error are required to return the funds to the School. The School will provide the employee with the correct salary calculation and the amount that is owed to the School. The employee may return the overpayment in full through a cashier's check or money order or allow the School to deduct the overpayment from the next paycheck.

The School may arrange for a repayment plan that is mutually agreeable to both the School and the employee and does not exceed one calendar year from the date of the overpayment. Should an employee resign prior to completing the repayment, the full amount shall become due upon termination. A repayment plan may be offered to a terminated employee not to exceed three (3) months in duration.

## G. Employee Evaluation

Supervisors will conduct performance reviews with all regular full-time and regular part-time employees annually. Supervisors may conduct informal performance

reviews and goal setting sessions more often if they choose.

Performance reviews are designed for the supervisor and the employee to discuss their current job tasks, encourage and recognize attributes, and discuss positive, purposeful approaches for meeting work-related goals. Together, the employee and supervisor will discuss ways in which the employee can accomplish goals and/or learn new skills.

Successful job performance is a factor in consideration for salary step advancement. For this reason, among others, it is important to prepare for these reviews carefully, and participate in them fully.

Additional details on employee evaluations will be provided by HR upon hire and annually as appropriate.

## H. Corrective Action

All employees are expected to meet School standards of work performance. Work performance encompasses many factors, including attendance, punctuality, personal conduct, job proficiency and general compliance with School policies and procedures. If an employee does not meet these standards, the School may or may not, at its sole discretion, take corrective action, other than immediate dismissal. Employees have no entitlement to corrective action or progressive discipline prior to dismissal.

The intent of corrective action is to formally document problems while providing the employee with a reasonable time within which to improve performance. The School holds each of its employees to certain work rules and standards of conduct. When an employee deviates from these rules and standards, the employee may be terminated, or, at the School's discretion, be subject to corrective action by a supervisor.

Corrective actions may include, but are not required to include, an oral warning, a written warning, probation, suspension, and termination of employment. In deciding which initial corrective action would be appropriate, a supervisor may consider the seriousness of the infraction, the circumstances surrounding the matter, and the employee's previous record. As an at-will employer, the School may use all, some, or none of the corrective actions described and will handle corrective action based on its own discretion.

Though the School will try to find paths for improvement whenever possible, the School considers certain rule infractions and violations of standards as grounds for immediate termination of employment. These include but are not limited to: any misconduct concerning a child/student, theft in any form, insubordinate behavior,

vandalism or destruction of School property, trespassing, the use of School equipment without prior authorization, untruthfulness about personal work history, skills, or training, divulging proprietary information, and misrepresentations of the School to another employee, a prospective employee, or the general public.

Nothing in this section or any other section alters an employee's status as an at-will employee who may be terminated, with or without cause and with or without advance notice at any time by the School. Nothing in this section is intended to interfere with an employee's rights to communicate or voice concerns that are protected by Federal and State law.

## I. Terminations

There are two types of terminations that may affect employees. Voluntary termination results when an employee voluntarily resigns their employment. Involuntary terminations result when the School makes the decision to end the at-will employment agreement.

Regardless of the reason for termination, all school-owned property, including vehicles, keys, credit cards, student files, or school property in the possession of the employee must be returned to the School immediately upon termination from employment, within 72 hours from the final date of employment with the School. Additionally, employees are not to recruit students from the School to a new place of employment.

All wages owed will be paid out upon the date of termination or within 72 hours after an employee's resignation if the employee gave 72 hours or less notice.

## J. Personnel Records

Employees have a right to inspect certain documents in the personnel file as provided by law. The contents of personnel records will be available for inspection to the current or former employee, or their representative, at reasonable intervals and at reasonable times, but not later than thirty (30) calendar days from the date the School receives a written request. However, the employee, or their representative, and the School agree in writing to a date beyond thirty (30) calendar days to inspect the records, and the agreed-upon date does not exceed thirty-five (35) calendar days from receipt of the written request. Additionally, the School shall provide a copy of the personnel records, at a charge not to exceed the actual cost of reproduction, to a current or former employee, or their representative, no later than thirty (30) calendar days from receipt of the request, unless the current or former employee, or their representative, and the School agree in writing to a date beyond thirty (30) calendar days to produce a copy of the records, as long as the

agreed-upon date does not exceed thirty-five (35) calendar days from the employer's receipt of the written request.

The employee may add comments to any disputed item in the file. Only HR, the CEO or designee is authorized to release information about current or former employees. Disclosure of personnel related information to agencies or individuals outside the School will be limited and in accordance with law; however, the School will cooperate with requests from authorized law enforcement or local, state or federal agencies conducting official investigations and as otherwise legally required.

The School is required by law to keep current all employees' names and addresses. Employees are responsible for notifying the School in the event of a name or address change.

## K. Destruction of Personal Information Records

In the course of the employee's duties at the School, they may encounter records which contain personal information (i.e., a person's name and Social Security Number, driver's license number, state identification number or any account number, credit or debit card number, access code or passwords that may permit access to an individual's financial account, payroll, or personal health information). The School expects all employees to take appropriate measures to maintain the confidentiality and integrity of such information and prevent unauthorized access. Employees must ensure hard copies of documents are stored securely, such as in a locked file cabinet, with access provided only to authorized individuals with a need to know. Electronic media must be encrypted or password protected. Passwords should never be included in any transmission that also contains the data. Employees should dispose of data no longer needed by shredding paper documents and properly erasing electronic media to ensure that the personal information cannot be read or reconstructed. Failure to follow proper storage and disposal procedures may result in disciplinary action up to and including termination.

## L. Employment Posters

The School maintains bulletin boards in School offices and on the HR information system that contain important information about employment. In addition to Federal and state required notices, school-related information will also be available in these locations. All employees are encouraged to read all of the information provided in detail. Any questions about the information should be directed to the supervisor or HR. These bulletin boards are reserved for School use only; employees may not post or remove any information from them.

## M. Outside Employment

This policy is not intended to prohibit an employee from working an appropriate second job. Employees are permitted to engage in outside work or hold other jobs, subject to certain restrictions as outlined below.

(1) Activities and conduct away from the job must not compete, conflict with or compromise the school interests or adversely affect an employee's job performance and the ability to fulfill all responsibilities to the School. Employees are prohibited from performing any services for customers on non-working time that are normally performed by the School. This prohibition also extends to the unauthorized use of any school tools or equipment and the unauthorized use or application of any confidential information. In addition, employees are not to solicit or conduct any outside business during paid working time.

(2) Employees are cautioned to consider carefully the demands that additional work activity will create before accepting outside employment. Outside employment will not be considered an excuse for poor job performance, absenteeism, tardiness, leaving early, refusal to travel or refusal to work overtime or different hours. If outside work activity causes or contributes to job-related problems, it must be discontinued, and, if necessary, normal disciplinary procedures will be followed to deal with the specific problem.

(3) In evaluating outside work, the following guidelines will be considered to determine whether the proposed employment is allowed. Employees may not engage in outside employment that:

- 1) involves working for a competing or similar model School;
- 2) occurs during work hours without the use of appropriate leave;
- 3) actually or potentially results in a conflict of interest with or interfere with the employee's responsibilities to the School;
- 4) involves working for an organization that does business with the School, such as contractors, community providers, suppliers and customers;
- 5) may adversely affect the School's image.

(4) Employees who have accepted outside employment may not use paid sick leave to work on the outside job. Fraudulent use of sick leave will result in disciplinary action up to and including termination.

If it is determined that the outside employment constitutes a conflict of interest or disruption of the School's operation, the employee will be asked to limit or restrict the outside employment. Disciplinary action up to and including termination of employment may be taken for outside employment that is inconsistent with this policy unless otherwise approved.

## N. Out of State Work Policy

California Pacific Charter Schools (“CalPac” or the “School”) is a nonprofit corporation that operates charter schools serving students in the state of California. Due to the online nature of the work at CalPac, several employees have either moved out of the state or have been hired into positions at the School while residing out of the state of California. CalPac has attempted to support employees in this decision without termination; however, with employees working in several different states, it has become increasingly costly and burdensome for the School to navigate the various rules, laws, and compliance requirements of each state.

For the purpose of this Policy, the term “out of state” refers to any work location outside the state of California. Employees who remain domiciled in California (i.e. military orders or transfers where residency is maintained in California) may not be considered to be out-of-state employees, subject to the laws of the state in which the employee resides.

Effective June 13, 2023, the following rules and procedures will apply regarding employees working out of state.

Employees who currently work out of state will not have their out-of-state status be a bar to their continued at-will employment provided they continue to reside in the same state as of the effective date of this policy or move back to California, the funding for the employee’s position is secure, and the employee meets performance expectations for their position.

Candidates for future employment will be selected first from those residing within the state of California and will be required to remain within the state of California as a condition of employment. Additionally, current employees seeking promotion, advancement, or reassignment will be subject to the same residency rules. The Superintendent may authorize out of state employment on an emergency case by case basis where physical presence is not required and/or for specialized positions that are difficult to fill (i.e. shortage areas such as special education, math, and science instruction).

Employees must provide sixty (60) days’ written notice to CalPac if they plan to move out of state. Employees who move out of state may be subject to termination from their at-will employment at the School. Additionally, other than attending conferences or training, employees may not perform any work out of state without



prior written approval from the School, as this may require the School to treat the employee as an out of state worker and subject the School to the employment laws of the out of state location.

This policy applies to all employees of CalPac regardless of classification. Nothing in this policy is intended to alter the at-will employment status or to provide a guarantee of continued employment as outlined in board policy 4010-CPCS or the employment agreement. Violation of this policy may result in discipline, up to and including termination of the at-will employment.

## O. Whistleblower Policy

It is the policy of the School to encourage its employees and applicants for School employment to disclose improper governmental activities, based in part on California Education Code Section 44110 et. seq. and to address written complaints that allege acts or attempted acts of interference, reprisal, retaliation, threats, coercion or intimidation against employees or applicants who disclose improper governmental activities. School management has the responsibility to seek out and correct any and all abuses resulting from improper governmental activities, and to protect those who come forward to report improper governmental activities.

Concerns that may be raised include, but are not limited to, the following:

- 1) Reporting suspected violations of local, state, and federal 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 School policy, specifically the policies contained in the handbook with reference to employee safety or health, unsafe working conditions or work practices in the employee's employment or place of employment.

A whistleblower can also be an employee who refuses to participate in an activity that would result in a violation of a state or federal statute, or a violation of or non-compliance with a local, state or federal rule or regulation.

The School may not:

- 1) Make, adopt, or enforce any rule, regulation, or policy preventing an employee from being a whistleblower;
- 2) Retaliate against an employee who is a whistleblower;
- 3) Retaliate against an employee for refusing to participate in an activity that would result in a violation of a state or federal statute, or a violation or



- noncompliance with a state or federal rule or regulation; or
- 4) Retaliate against an employee for having exercised their rights as a whistleblower in any former employment.

## P. Complaint Procedure

The School encourages employees to resolve issues or concerns at the lowest level possible to ensure a positive and professional work environment. When issues cannot be successfully resolved or the issue is serious in nature against the supervisor, the employee should bring the matter to the attention of HR for assistance. The complaint procedure approved by the Board of Directors is as follows:

1. The complainant will bring the matter to the attention of the Human Resources manager as soon as possible after attempts to resolve the complaint with the immediate supervisor have failed or were not appropriate; and
2. The complainant will reduce their complaint to writing, indicating all known and relevant facts, in the School's Internal Complaint Form. The Human Resources manager or designee will then investigate the facts and provide a solution or explanation.
3. If the complaint is about the Human Resources manager or CEO, the complainant may file their Internal Complaint Form with the President of the School's Board of Directors, who may then confer with the Board and may conduct a fact-finding investigation or authorize a third party investigator on behalf of the Board. The Board President or investigator will report their findings to the Board for review and action, if necessary.

This policy cannot guarantee that every problem will be resolved to the employee's satisfaction. However, the School values each employee's ability to express concerns, and the need for resolution without fear of adverse consequence to employment.

1. Confidentiality: All complainants will be notified that information obtained from the complainants and thereafter gathered will be maintained in a manner as confidential as possible, but in some circumstances absolute confidentiality cannot be assured.
2. Non-Retaliation: All complainants will be advised that they will be protected against retaliation as a result of the filing of any complaint or participation in any complaint process.
3. Resolution: The School will investigate complaints appropriately under the

circumstances and pursuant to the applicable procedures, and if necessary, take appropriate remedial measures to ensure effective resolution of any complaint.

## Q. Uniform Complaint Procedures

The School will provide annual notice to all employees of the Uniform Complaint Procedures that may be used to allege a violation of federal or state laws governing certain educational programs. Copies of the Uniform Complaint Procedures and additional information may be found in the board policy section on the School's website or by contacting HR.

## Section V: Operational Considerations

### A. Employer Property

Anything purchased with school funds such as computers and educational materials are considered School property and must be maintained according to School rules and regulations. School property is to be used only for work-related purposes. The School reserves the right to search and inspect all School property and any property used by employees in work related duties to ensure compliance with its rules and regulations, without notice to the employee and at any time, not necessarily in the employee's presence.

Employees may make or accept personal telephone calls, text messages, or emails within reason during working hours to perform important personal business. It is also acceptable to use a computer to perform the same minimal personal tasks. Employees may not use the School's phone to make personal calls that would incur long distance fees.

The School may periodically need to assign and/or change passwords and personal codes for voicemail, email and computer. Except as provided herein, these communication technologies and related storage media and databases are to be used only for School business and they remain the property of the School. The School reserves the right to override any such password system at any time at its sole discretion, with or without cause.

Prior authorization must be obtained from the CEO or designee before any School property may be removed from the School premises, except in the course of normal movement of educational materials/computers by the employee. In this case, regular check-out/tracking procedures must be followed.

Terminated employees who work at a school site should remove any personal items

at the time they leave the School. Personal items left in the workplace are subject to disposal if not claimed at the time of an employee's termination.

Employees must safeguard and not damage/destroy School property, including computer hardware or software, e-mails, internal files, notes and correspondence, student records, papers, recordings, pictures, screenshots, and any other items of any nature that belong to or concern the School. Upon separation of employment, employees must return all of the School's property and proprietary information as soon as possible, no later than 72 hours from the final date of employment, and not share, destroy, or retain any copies of such property and information.

Any employee who is found to have neglected or misused the School's property will be subject to disciplinary action up to and including termination. If an employee's misuse of the School's property damages the property, the School reserves the right to require the employee to pay all or part of the cost to repair or replace the property. Misappropriation of the School's property is grounds for immediate termination and possible criminal action.

## B. Use of Electronic Media

The School uses various forms of electronic communication including, but not limited to computers, email, telephones and web sites. All electronic communications, including all software, databases, hardware, and digital files, remain the sole property of the School and are to be used only for School business and not for any personal use, except as allowed above.

Electronic communication and media may not be used in any manner that would be discriminatory, harassing or obscene, or for any other purpose that is illegal, against School policy or not in the best interest of the School.

Employees who misuse electronic communications and engage in defamation, copyright or trademark infringement, discrimination, harassment, or related actions will be subject to discipline up to dismissal. The School reserves the right to require authorization prior to installation of software on a School computer and/or mobile devices.

All electronic information created by any employee using any means of electronic communication is the property of the School and remains the property of the School. With School approval, employees may use personal passwords for purposes of security, but any employee's use of a personal password does not affect the School's ownership of the electronic information.

The School may at any time override all personal passwords for any reason.

The School reserves the right to access and review electronic files, messages, mail, and other digital archives, and to monitor the use of electronic communications as necessary to ensure that no misuse or violation of School policy or any law occurs.

Employees are not permitted to access the electronic communications of other employees or third parties unless directed to do so by school administration.

Access to the Internet, websites, and other types of School-paid computer access are to be used for School related business. Any information about the School, its products or services, or other types of information that will appear in the electronic media about the School must be approved by the CEO or designee before the information is placed on an electronic information resource that is accessible to others.

Questions about access to electronic communications or issues relating to security should be addressed to the CEO or designee.

## C. Social Media

Social media can serve as a powerful tool to enhance communication. This technology can provide many benefits for communication. This section addresses employees' use of publicly available social media networks including: personal Websites, Web logs (blogs), WIKIs, social networks, online forums, virtual worlds, and any other social media. The School takes no position on employees' decision to participate in the use of social media networks for personal use on personal time. However, use of social media for personal use during School time or on School equipment is prohibited. In addition, employees must avoid posting any information or engaging in communications that violate state or federal laws or School policies.

### General Statement

The line between professional and personal relationships is blurred within a social media context. When employees choose to join or engage with students, families or fellow employees in a social media context that exists outside those approved by the School, they are advised to maintain their professionalism as School employees and have responsibility for addressing inappropriate behavior or activity on these networks, including requirements for mandated reporting. Employees must avoid posting any information or engaging in communications that violate state or federal laws or School policies.

Employees are expected to serve as positive ambassadors and to remember they are role models to students in the community. Because readers of social media networks may view the employee as a representative of the School, the School requires

employees to observe the following rules when referring to the School, students, programs, activities, employees, volunteers and communities on any social media networks.

Employees must be respectful and professional in all communications (by word, image or other means). Employees shall not use obscene, profane or vulgar language on any social media network or engage in communications or conduct that is harassing, threatening, bullying, libelous, or that discusses or encourages any illegal activity or the inappropriate use of alcohol, use of illegal drugs, sexual behavior, sexual harassment, or bullying. Be sensitive about linking to content. Redirecting to another site may imply an endorsement of its content.

Employees must make clear that any views expressed are the employee's alone and do not necessarily reflect the views of the School. Employees may not act as a spokesperson for the School or post comments as a representative of the School, except as authorized by the CEO or designee. When authorized as a spokesperson for the School, employees must disclose their employment relationship with the School.

Protect confidential information. Employees may not disclose information on any social media network that is confidential or proprietary to the School, its students, or employees or that is protected by data privacy laws. Employees should be thoughtful about what they publish and must make sure they do not disclose or use confidential information. Students, parents, and colleagues should not be cited or obviously referenced without their approval. For example, ask permission before posting a student's/co-worker's picture on a social network (student photos require parental consent) or publishing a conversation that was meant to be private.

It is acceptable to discuss general details about student projects, lessons, or school events and to use non-identifying pseudonyms for an individual (e.g., teacher, students, parents) so long as the information provided does not make it easy for someone to identify the individual or violate any privacy laws. Public social networking sites are not the place to conduct School business with students or parents; please conduct these interactions using the School's network.

Employees may not post any private images of the School premises and property, such as workrooms, offices, including floor plans. Nothing in this policy is meant to prevent employees from posting information that is allowable by the National Labor Relations Act.

Be transparent. Honesty or dishonesty will be widely available on social media. If the employee is posting about their role at the School, the employee must use their real name and identify their employment relationship. The employee must be clear about

their role; if they have a vested interest in something being discussed, to be the first to point it out.

Perception can be reality. In online networks, the lines between public and private, personal and professional are blurred. Employee's identification as a School employee, may create perceptions about expertise and about the School by community members, parents, students, and the general public. When posting online be sure that all content is consistent with employee work values and with the School's beliefs, core values and professional standards.

Work/Personal Distinction. Staff members are encouraged to maintain a clear distinction between their personal social media use and any School-related social media sites. The employee may consider setting up separate social media accounts for personal and professional use.

Personal Social Networking & Media Accounts. Before employees create or join an online social network, they should ask themselves whether they would be comfortable if a 'friend' decided to send the information to their students, the students' parents, or their supervisor. School employees must be mindful that any Internet information is ultimately accessible to the world.

Social Interaction With Students. Employees should not have online interactions with students on social networking sites outside of those forums dedicated to academic use. School employees' personal social networking profiles and blogs should not be linked to students' online profiles.

Contacting Students Off-Hours. Employees should only contact students for educational purposes and must never disclose confidential information possessed by the employee by virtue of their employment. Contacting students after hours must be kept to a minimum and be strictly for the purpose of academic support or to relay general information to all students.

Be a positive role model. Educational employees have a responsibility to maintain appropriate employee-student relationships, whether on or off duty. Both case law and public expectations hold educational employees to a higher standard of conduct than the general public.

School Logo. The use of the School logo(s) on a social media site or elsewhere must be approved by the CEO or designee.

The School expects all who participate in social media to understand and follow these guidelines.

## D. Public Relations

Serving students and families requires a variety of professional skills. School employees are expected to demonstrate the following communication skills and abilities:

1. Ability to transmit passion for learning to students and families.
2. Flexibility and adaptability.
3. Well developed, clear communication and interpersonal skills that maintain a respectful, professional and courteous manner.
4. Conflict resolution skills.
5. Openness to differing views and objectives.
6. Ability to deliver information concerning curriculum, teaching, assessment, and learning to families.
7. Serve the student and parent's needs to the best of their ability without allowing their own convenience to interfere.

The success of the School depends upon the quality of the relationships between the School, its employees, students, parents and the general public. The public impression of the School and its interest will be formed, in part, by the employees; employees are ambassadors. The more goodwill an employee promotes, the more employees, students, parents and the general public will respect and appreciate the employee, the School, and the Schools' services.

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

1. Communicate regularly.
2. Act competently and deal with others in a courteous and respectful manner.
3. Communicate pleasantly and respectfully with other employees at all times.
4. Follow up on requests and questions promptly, provide businesslike replies to inquiries and requests, and perform all duties in an orderly manner.
5. Respond to email and voicemail within 24 hours during the workweek.
6. Take great pride in their work and enjoy doing their very best.
7. Be proactive and work to anticipate the needs of those being supported.

When an employee encounters an uncomfortable situation that the employee does not feel capable of handling, their supervisor should be contacted immediately.

If a problem develops or if a parent remains dissatisfied, the employee should contact their supervisor for assistance.

Employees should not speak to the media on the School's behalf without contacting



the School's CEO or designee. All media inquiries should be directed to the CEO or designee.

## E. Solicitation & Distribution

In order to ensure smooth operations, the School has established the following guidelines to be respected while at work. As long as it is done during non-working hours for all employees involved (such as meal periods or rest breaks), employees are permitted to engage in solicitation (i.e., asking for contributions, selling merchandise) anywhere on School premises, as long as it is done in a non-disruptive and inoffensive manner. Employees may only engage in distribution (i.e., handing out pamphlets, literature, petitions) during non-working hours for all employees involved and in non-working areas (such as the lunch room). Solicitation or distribution is not allowed in areas open to the public. Employees are prohibited from posting notices on the School bulletin board or in any other office location and from removing any items without management approval. The School may, at its discretion, authorize certain fund-raisers and collections for employee gifts. Employees who want to organize such an event, must obtain prior approval from the supervisor. Solicitation and distribution by non-employees is prohibited at all times on School property.

## F. Inclement Weather/Emergency Closings

At times, emergencies such as severe weather, fires, or power failures can disrupt School operations. The decision to close the office will be made by the CEO or designee. When the decision is made to close the office, employees will receive official notification from their supervisors. Employees will be paid for any remaining portion of their work day for the first day of the declared emergency closing. If the office continues to be closed, office employees will be expected to transition to remote work. An employee who is unable to transition to remote work may utilize their available applicable leave to remain in paid status. Employees may not be retaliated against for leaving the office during emergency circumstances when their safety is in jeopardy.

Employees are encouraged to listen to local news and radio reports for status updates. In general, the School will follow the decisions of the local community. Days that the School is closed due to inclement weather or other emergency may create a need to extend the work year or shorten holiday breaks.

## Section VI: Health and Safety

All employees are responsible for their own safety, as well as that of others in the workplace. To help maintain a safe workplace, everyone must be safety-conscious at all times. In compliance with California law, and to promote the concept of a safe workplace, the School maintains an Injury and Illness Prevention Program.



In compliance with Proposition 65, the School will inform employees of any known exposure to a chemical known to cause cancer or reproductive toxicity. See the School's Safety Plan for more information.

## A. Telecommuting - Remote Work Policy

The School may allow employees to telecommute if it benefits the interests of the School. A written proposal for such arrangements must be presented to HR and the supervisor for review and approval. Employees who telecommute may be required to attend in-person meetings at the office or other designated locations.

Telecommuting does not change the employee's work location and employees are still responsible for all costs associated with travel to and from the office as part of their reasonable commute, when they are required to report to their work location.

Employees are encouraged to speak with a tax professional as to any tax benefits or deductions for utilizing a home office. Employees are responsible for any tax liability should they claim such an expense and it is later disallowed by the Internal Revenue Service.

Employees who telecommute must maintain the security of all confidential and/or sensitive information and other proprietary information, as if they were working in the office. All security procedures apply, regardless of whether the employee is in the workplace or telecommuting. Certain confidential documents or information will not be taken home without authorization from the CEO or designee.

Employees who telecommute are responsible for following all safety rules. Telecommuters will develop a written agreement with the CEO or designee concerning the type and amount of work the telecommuter will be expected to perform. The ability to telecommute does not change the level of performance expected from an employee. Nonexempt employees will track their time in the School timekeeping system and report work accomplished at a frequency agreed upon with the supervisor. Exempt employees must complete the duties as outlined in their job description and assigned by their supervisor.

Employees who are subject to overtime laws are required to adhere to their beginning and ending work times, rest break, and meal periods. Telecommuting employees must continue to maintain required time records. Work time must be recorded on the employee's timesheet.

The School retains the right to require a reapproval process and/or rescind any telecommuting agreement at any time and to require any telecommuter to report to

the office or work location to work.

Violation of any telecommuting policies may result in the immediate termination of any telecommuting agreement.

## B. Student Safety

The effective employee is concerned for the welfare of students and takes measures to ensure their welfare. Nevertheless, it is important to be aware of the possible consequences of negligence. The employee is responsible to act in a reasonable and prudent manner at all times. Specifically, the employee must do the following:

1. Always ensure that online students are supervised and have another responsible adult present when they are in online classrooms.
2. Require students to conduct themselves in an orderly, safe manner and administer such disciplinary actions as are reasonable and proper in any situation involving student misconduct.
3. Report any unsafe conditions to the supervisor so that it may be corrected.
4. Ensure Zoom settings are correct for student safety.
5. Strictly adhere to all stated policies of the School.

Failure by employees to meet their responsibilities may have severe consequences (e.g., revocation of their license, criminal charges, etc.). Additionally, teachers may be held legally liable for negligence in the performance of their duties.

## C. Employee Safety

The School is committed to providing the resources necessary to develop, implement, and administer a safety program for the protection of its employees. All administrative personnel and employees are expected to meet their responsibilities to make the safety program effective and productive. Periodic reviews of the safety program will be conducted by administration to maintain its effectiveness.

All accidents, injuries, potential safety hazards, safety suggestions and health and safety related issues must be reported immediately to the supervisor, CEO, or HR. When reporting the injury, the employee should advise staff if emergency services should be involved, or if the injury requires medical attention. HR will help determine the best course of action. If an injury does not require medical attention, an Employer Report of Injury/Illness Form must still be completed in case medical treatment is later needed and to ensure that any existing safety hazards are corrected. The Employee's Claim for Worker's Compensation Benefits Form must be completed in all cases in which an injury requiring medical attention has occurred. The employer will immediately notify OSHA in the event the employee sustains a serious illness, injury, or exposure that results in hospitalization as per CalOSHA

guidelines.

## D. Transporting Students

Employees are not permitted to transport students. In the event a student needs transportation for a school-related purpose, the School will arrange for transportation in coordination with the parent or guardian.

## E. Employee Driving Policy

CPCS must ensure that risks to the School are minimized and ensure that only safe drivers are allowed to drive on School business. The Board requires that all employees who regularly drive as part of their job duties ("Driving Employees") meet minimum standards of safety and insurance, which must be verified by the School. Driving employees must obey all traffic laws and drive safely while on School business.

Positions requiring driving shall state such in the job description and staff will be required to maintain a valid driver's license and vehicle insurance in order to meet the minimum qualifications of the position and perform the essential duties of the role. This policy covers all school employees and violation of the School's policy is grounds for discipline up to and including termination.

### Driver's License and Insurance Coverage

1. In order to operate a personal vehicle when used to perform CPCS business, Driving Employees must have a valid driver's license and automobile insurance meeting the minimum standards established in this policy at all times. Evidence of the Driving Employee's driver's license and automobile insurance certificate will be kept on file. The Driving Employee is responsible for providing an updated driver's license and automobile insurance certificate whenever it expires or upon request. The CEO or designee must be notified immediately if the Driving Employee no longer has a valid driver's license or insurance certificate. Any Driving Employee whose driver's license or insurance certificate lapses or is canceled or revoked for any reason, and who cannot otherwise arrange for travel as required by their position, may be terminated or placed on inactive/unpaid status until the issue is remedied.
2. CPCS requires that a Driving Employee carry the following insurance amounts and coverage:

Automobile Liability - \$100,000 per person; \$300,000 per occurrence  
Property Damage - \$50,000 per occurrence  
Medical Payments - \$5,000 per person

### Notification of Traffic Violations Resulting in Criminal Convictions

CPCS receives notifications from the Department of Justice (DOJ) when an employee has been arrested and when there has been a conviction for a crime. Notification of a traffic violation resulting in a misdemeanor or felony charge will be discussed with the employee. Certain driving violations may be grounds for termination from a position that requires regular driving such as:

1. Attempting to evade a police officer
2. Driving with a revoked or suspended license
3. Hit and run
4. Speeding over one hundred (100) miles per hour
5. Reckless driving
6. Driving under the influence of drugs and alcohol

### Responsibilities of Human Resources

When recruiting for positions that require the employees to operate a vehicle, the posting notice shall advise applicants that a current driver's license record and verification of automobile insurance will be required prior to a final job offer.

### Employee Responsibility

Employees are responsible for maintaining driver's licenses and special certificates required for the performance of job duties. Employees are also responsible for promptly notifying their supervisor of expiration, conviction, or other DMV actions against their driver's license or certificate by no more than five (5) business days from the occurrence.

### Use of Electronic Devices While Operating a Vehicle

CPCS recognizes staff members may spend a considerable amount of time driving for business purposes. It is the intention of the School to ensure all staff members are safe while driving a vehicle. Although hands-free options are available, it is the policy of the School to discourage employees from utilizing a cell phone or other electronic devices while operating a vehicle.

Distracted driving can be described as any visual, cognitive or manual distraction which takes attention away from the task of safe driving.

Employees are expected to follow all federal and state distracted driving laws. Employees who are charged with traffic violations resulting from the use of an electronic device while driving will be solely responsible for all liabilities that result from such actions.

The School highly encourages employees to use their best judgment and reserve all conversations conducted on an electronic device for when they are not in operation

of a vehicle. It is recommended that employees find a safe location and park their vehicle prior to placing or accepting a telephone call. Texting while driving is prohibited. Voice texting while driving is strongly discouraged. Safety must come before all other concerns.

#### Revocation of Driving Privilege

1. Human Resources will monitor the subsequent arrest notifications from the DOJ. Any Driving Employee who is convicted of a DUI, loses their driver's license or driving privilege, or is deemed to be a "negligent operator" by the DMV, and fails to make suitable arrangements for alternative transportation to maintain meetings as an essential function of their position will immediately be placed on unpaid administrative leave.
2. Seatbelts are an essential element of the School's safety procedures. To emphasize seat belt awareness, one (1) seatbelt violation while on CPCS business will equate to a moving violation and may lead to disciplinary action. Repeat seatbelt violations could lead to termination of the at-will employment agreement.

#### Alternative Transportation

All employees must make suitable arrangements to ensure timely attendance at all appointments that are essential job functions. With the advance approval of the CEO or designee, the employee may be reimbursed the actual miles traveled using the Schools' current mileage reimbursement rate, for their travel using public transportation or rideshare service where a personal vehicle is not available or alternative transportation is not feasible. Driving Employees will not be reimbursed additional charges and expenses outside of the actual miles traveled for utilizing a rental car, taxi, or rideshare service in the event that the employee's personal vehicle is unavailable.

Nothing in this policy is intended to replace the employer's responsibility to engage in the interactive process with an employee who has requested accommodation due to an illness, injury, or disability. HR will ensure compliance in all matters pertaining to this policy.

## F. Contagious Illnesses in the Workplace

The School realizes that employees with contagious temporary illnesses such as influenza (including COVID-19, H1N1 or Swine Flu), colds, and other viruses, or other communicable diseases may wish to continue with normal life activities, including working. In deciding whether an employee with an apparently short-term contagious illness or communicable disease may continue to work, the School considers several factors. The employee must be able to perform normal job duties;

meet regular performance standards; and, in the School's judgment, pose no potential risk to the health or safety of the employee or others. If the School determines that an employee is unable to perform normal job duties; meet regular performance standards; or represents a potential risk to the health or safety of the employee or others, the School reserves the right to send the employee home and require the use of any available sick or vacation time, and if none is available the time would be unpaid. If an employee disagrees with the School's determination that such a risk exists, the employee must submit a statement from their attending healthcare provider that the employee's continued presence at work poses no significant risk to the employee, other employees, or students before they are allowed to return to work.

The following are general health and hygiene practices recommended by the Centers for Disease Control:

1. Stay home when sick. An employee should not return to work until they have been free of a fever for at least 24 hours.
2. Use proper etiquette: cover the cough or sneeze with a tissue or cough or sneeze into the elbow.
3. Wash hands often, especially after sneezing, coughing, or having contact with others. Alternatively, use a hand gel disinfectant and rub hands until the gel is dry.
4. Avoid touching eyes, nose, or mouth.
5. Ensure that general use office machines, such as shared computers, faxes, and copiers, are wiped down with disinfectant.
6. Healthy lifestyles are encouraged, including good nutrition, exercise, and adequate rest.

Supervisors will encourage employees to utilize paid sick and vacation if available to cover absences due to contagious temporary illnesses.

The School will comply with all applicable statutes and regulations that protect the privacy of persons who have a contagious or communicable disease.

In the case of a pandemic (such as COVID-19, H1N1 or Swine Flu) or illness, the School may implement specific procedures through its emergency communication action plan including utilizing employees in essential operation positions; implementing controls and scheduling in the work environment; encouraging ill employees to stay home; modifying work schedules; implementing telecommuting; minimizing non-essential travel; social distancing (reducing frequency, proximity, and duration of contact between people); utilizing phone, email, and video-conferencing; personal protective equipment (PPE); and education and training on safe work practices, risk factors, and protective behaviors. Employees will be notified if the emergency communication action plan is implemented.

## G. Gun Violence Restraining Order

If an employee, parent, or student demonstrates a substantial likelihood of significant danger or harm to self or others, a gun violence restraining order petition may be filed. The petitioner may be an immediate family member, law enforcement officer, employer, co-workers with employer approval who regularly interact with the person, or an employee or teacher of a secondary or postsecondary school. A copy of the restraining order is to be submitted to HR.

## Section VII: Employee Wages and Benefits

### A. Wages

Several factors may influence the compensation for a position. Each position is defined by a broadly written job description that indicates the duties to be performed and the necessary knowledge, skills, and abilities for the assignment. These factors are reviewed when determining the appropriate compensation. Some of the items the School considers are the nature and scope of the job duties, what other employers pay their employees for comparable jobs (external equity), what the School pays their employees in comparable positions (internal equity), and individual work as well as performance. Wages are also affected by legislative changes and the State's economy, and may be adjusted upward or downward as changes occur.

Initial step placement will be based on related prior experience, with a maximum entry placement of step six on the board approved salary schedule. The CEO is given authority to offer a higher entry step placement in areas of shortage such as math, science, or special education in order to secure highly qualified candidates for positions. Step advances will be considered for employees who remain in paid status for at least 75% of the work year calendar. Consideration for step advancement will also be based upon the School's budget solvency, successful employee performance, and any other relevant factors determined by management.

The employee's performance review will usually be conducted on or about the end of the fiscal year. A positive performance review will not necessarily result in a change in compensation.

### B. Stipends

Stipends may include supplies, cell phone/internet, and/or mileage. Stipends may also be issued for performing specific additional job duties. Stipends may be evenly distributed across the employee's pay periods or issued at the time the services are rendered. All stipends will be reviewed annually.

### C. Paydays



All salaried exempt employees are paid on the 26<sup>th</sup> of the month. In the event that a regularly scheduled payday falls on a weekend or holiday, employees will receive pay on the prior day of operation.

Hourly and salaried nonexempt employees are paid on or about the 10<sup>th</sup> and 26<sup>th</sup> of each month. Hours worked from the 16<sup>th</sup> through the last day of each month will be paid on or before the 10<sup>th</sup> of the following month. Hours worked from the 1<sup>st</sup> through the 15<sup>th</sup> of the month will be paid on or before the 26<sup>th</sup> of each month. For more information on pay periods, please contact payroll.

Paychecks will not, under any circumstances, be given to any person other than the employee without written authorization. Employees will be paid through manual checks or through direct deposit of funds to savings or checking accounts at their bank of choice (providing the bank has direct deposit capability). To activate direct deposit, a Direct Deposit Authorization form may be obtained in the online HR system. Due to banking requirements it may take several weeks for activation of the direct deposit.

Every effort is made to avoid errors in calculating and distributing paychecks. Employees should inform HR if they believe an error has been made or pay has not been received. HR will take steps to research the problem and endeavor to make any necessary corrections as soon as possible or at least by the next regular pay day.

## D. Payroll Withholdings

As required by law, the School shall withhold Federal Income Tax, State Income Tax, Social Security (FICA) for non-credentialed employees, CalSTRS for eligible Teachers/Administration and State Disability Insurance from each employee's pay as follows:

1. Federal Income Tax Withholding: The amount varies with the number of exemptions the employee claims and the gross pay amount.
2. State Income Tax Withholding: The same factors which apply to federal withholdings apply to state withholdings.
3. For non-credentialed employees: Social Security (FICA) - The Federal Insurance Contribution Act requires that a certain percentage of employee earnings be deducted and forwarded to the federal government, together with an equal amount contributed by the School. The current tax rate is used in the calculation. Each party is responsible for contributing. Eligible credentialed employees participating in CalSTRS do not contribute to Social Security.
4. State Disability Insurance (SDI): This state fund is used to provide benefits to those out of work because of illness or disability.
5. For credentialed employees contributions will be deducted and remitted to



California State Retirement System (CalSTRS). The CalSTRS is a special trust fund established by California law. Per the guidelines of CalSTRS, the school will abide by membership eligibility. A contribution withdrawal begins with the first pay period. This contribution is in lieu of Social Security withholding tax from the paycheck. Additionally, the School contributes into the CalSTRS fund. All employee and employer contributions are determined by CalSTRS. Further information regarding CalSTRS accounts can be found at [www.CalSTRS.com](http://www.CalSTRS.com).

6. For all employees participating in employee benefits offerings such as health insurance, the employee contribution for benefits (the amount that exceeds the employer's contribution towards benefits) will be deducted from the employee's paycheck. The amount will be discussed and approved prior to the deduction being made. Please reference "Employee Cost Sharing" under "Employee Benefits" section of the Handbook for more information.

Every deduction from the paycheck is explained on the paystub, which will be available in the HR/Payroll Information System. Please contact payroll if any deduction is unclear.

All Federal, State, and Social Security taxes will be automatically deducted from paychecks. Federal and State Withholding Tax deduction is determined by the employee's W-4 (Federal) and DE-4 (State) forms. The W-4 and DE-4 forms are to be completed upon hire. The employee may change the number of withholding allowances they wish to claim for Federal Income Tax purposes at any time in the HR information system by updating their W-4 and DE-4 withholdings.

At the end of the calendar year, a "withholding statement" (W-2) will be prepared and provided to each employee for use in connection with preparation of income tax returns. The W-2 shows Social Security information, taxes withheld, and total wages.

While the School strives to process payroll correctly, an error may occur from time to time. If this happens, every effort will be made to correct the problem as quickly as possible and to avoid future errors of a similar nature. Employees will not be subjected to discrimination, harassment, or retaliation for coming forward with a complaint or question about their paycheck.

## E. Wage Attachments and Garnishments

When an employee's wages are garnished by court order, the School is legally bound to withhold the amount indicated in the garnishment order from the employee's paycheck. The School will, however, honor the Federal Consumer Credit Protection Act, which places restrictions on the total amount that may be garnished from an employee's paycheck.

## F. Employee Benefits

The School is committed to providing quality and cost effective benefit options (e.g. health, dental, vision, and life insurance) for eligible employees as part of the total employee compensation. Benefit eligibility may be dependent upon employee classification (full-time versus part-time, for example). Benefit eligibility requirements may also be imposed by the School and/or plans themselves. Policies, provisions and procedures that govern the organization's benefit program apply to all regular full-time and part-time employees, whether exempt or nonexempt status, unless otherwise noted in the employment agreement.

### 1. Employee Cost Sharing

Voluntary employment benefits, those benefits that are not mandated by state or federal law, are selected and controlled by the School. Decisions to provide and continue providing these benefits are based on such considerations as cost, composition of the workforce, operational efficiency, and desirability of benefit provisions. Where costs of discretionary insurance benefit plans exceed the School's interest, ability, or willingness to pay the full premium rate to maintain the current benefit level, employees may be required to share in the cost in order to continue the insurance plan coverage.

Exempt (FTE)	Non-Exempt (Hours per Week)	<i>Eligible employees will have the option to choose one of the following offerings:</i>	
		<i>*Tiered Benefit Stipends (for Health, Dental, and/or Vision)</i>	<i>*Cash In Lieu of Benefits</i>
.80+ FTE	32+ hours	\$1,300/month \$15,600/year	\$200/month
.60 - .79 FTE	24-31 hours	\$780/month \$9,360/year	\$100/month
.59 FTE or less	23 hours or less	not eligible	not eligible

*Benefits go into effect the first of the month following benefit eligibility.*

### 2. Benefit Design and Modification

The School reserves the right to design plan provisions and to add, eliminate, or in other ways modify any School provided benefits described in this handbook or elsewhere in plan documents, where and when it is deemed in the School's best interest to do so. These benefits are subject to change depending on management

decisions and resources.

### 3. Benefit Plan Documents

Employees will be provided with summary plan descriptions upon eligibility and enrollment. The benefit programs are explicitly defined in legal documents, including insurance contracts, official plan texts, and trust agreements. In the event of a conflict between these documents and this policy, the plan documents will govern. All of these official documents are readily available from HR for review. Questions about this information should be directed to HR.

### 4. Cash in Lieu of Health Benefits

Eligible employees may opt out of health benefits provided by the School and elect to receive a "Cash in Lieu" (CIL) option. CIL is dependent upon employment status and full time equivalent. Please refer to the employment agreement for more information.

In order to be eligible for cash in lieu of health benefits, an employee must provide proof of enrollment in a qualifying group health plan, including their name and the effective date of coverage, on their spouse or parent's employer sponsored plan, State Medicaid, Medicare, or VA Benefits. Proof of enrollment must be provided at the time of benefit enrollment for new hires or during the open enrollment period in order for the cash in lieu of benefits to be paid. Individual Family Plans (IFP) and Covered California coverage plans are not eligible for cash in lieu of benefits. All eligible employees will automatically be enrolled in the employer provided life insurance plan. Payment of the appropriate CIL amount will occur on each pay period of the current school year.

If the employee should enroll part way through the plan year due to a Qualifying Life Event (QLE), or if hired after the start date for the position, the annual CIL will be adjusted at the next pay period.

### 5. Right to Modify

The School reserves the right to amend, modify or terminate, in whole or in part, any or all of the provisions of the benefit plans described herein, including any health benefits that may be extended to retirees and their dependents to the extent allowed by law. Notice of any such changes will be provided, as required by law. Further, the School reserves the exclusive right, power and authority to administer, apply and interpret the benefit plans described herein, and to decide all matters arising in connection with the operation or administration of such plans, to the extent allowed by law. This section is subject to change in accordance with changes in the law.

### 6. Changes in Health Benefits

Employees may make changes to their plans outside of open enrollment if they experience a Qualifying Life Event (QLE). Examples of such events include marriage, divorce, birth, adoption, loss of coverage, etc. An employee has 30 days from the date

of the QLE to notify human resources and enroll in or make changes to their health plan.

For more complete information regarding any of the benefit programs, please contact HR.

#### 7. COBRA Benefits

The Federal Consolidated Budget Reconciliation Act (COBRA) gives employees and their qualified beneficiaries the opportunity to continue health insurance coverage under the 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, leave of absence, divorce or legal separation, and a dependent child no longer meet eligibility requirements.

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

#### 8. Look-back Measurement Method – Seasonal and Variable Hour Employees

For seasonal employees as well as part time employees hired to work less than 20 hours per week the School will use a look-back measurement method to determine benefit eligibility status.

This method is used to determine the benefits eligibility status of an employee by looking back over a defined period of time (12 months) to determine if the employee averaged at least 20 hours per week during that period. The initial measurement period begins on the first day of the calendar month following the employee’s start date. An administrative period of 60 days in addition to the initial measurement period will be used to determine if an employee has satisfied the requirement of an average of 20 hours per week to be eligible for coverage.

A stability period (designated period where coverage must be offered) of 12 months will be offered to all individuals identified as employees working at least 20 hours per week on average during the measurement period.

After a new variable-hour or seasonal employee has been employed for a standard measurement period, the employee is considered to be an ongoing employee and will have their hours measured from open enrollment or plan year.

## G. Retirement Plan Offerings

The School is committed to providing retirement benefits to its employees. Plan

details may be obtained through HR.

#### 403(b)/457(b) Deferred Compensation Plan

All employees can open a 403(b) and/or 457(b) account and make employee contributions through payroll deductions.

#### Employer Contributions:

The School will contribute to a 457(b) for eligible classified employees. In order to receive employer contributions, the eligible employee must first open a 457(b) account. The employer will then provide a guaranteed contribution of 3% to the eligible employee's account starting with the first payroll in the month following the establishment of the account.

Additionally, the employer will provide a matching contribution to the employee's 457(b) account in an amount not to exceed up to 5% of the employee's base annual salary. Eligible employees are immediately vested in employer contributions, however, seasonal employees are not eligible for employer contributions.

#### Eligible Employees:

To be eligible for an employer contribution, a classified employee must work at least 24 hours/week as part of the regular work schedule for the assignment.

Certificated staff participating in CalSTRS are not eligible for an employer contribution to a 457(b) plan.

#### California State Teachers Retirement System (CalSTRS)

The School offers a defined benefit plan through CalSTRS. Eligible credentialed employees employed at a CalSTRS school will be mandatorily enrolled in CalSTRS, and have employer and employee contributions submitted to CalSTRS on a monthly basis. Benefit information on this program is available at the CalSTRS website at [www.calstrs.com](http://www.calstrs.com).

Sick leave hours may be applied as service credit through CalSTRS for retirement. Upon hire, HR will provide a certificated employee a verification of employment and transfer of sick leave form. Certificated new hires may submit this request to their former school if applicable to transfer their basic sick leave accrual balance as defined by CalSTRS. As excess sick accrual creates a financial burden for the school, only basic sick leave hours will be transferred and added to the employee's sick accrual with CalPac.

## H. Expense Reimbursement Process

The School receives public funds for its operations and must adhere to all laws, policies, and procedures in their use. As a steward of public funds, all staff will ensure that purchases and expense reimbursements follow the board approved policies and procedures. The School will only reimburse actual and necessary business expenditures for staff. Staff shall be held accountable for good judgment

regarding expenditure of tax dollars.

#### 1. Supplies

Due to the virtual nature of this business, it may sometimes be most practical for employees to initiate purchases locally and be reimbursed for those expenses. Pre-approval by a supervisor is required in the event the employee wishes to purchase an item. Reasonable, actual business expenses incurred by employees for the purpose of conducting business on behalf of the School shall be reimbursed upon approval. Expense reimbursement requests must be submitted within thirty (30) days of the date of the expense.

#### 2. Travel

The School supports staff development and participation in meetings and training in person as necessary. Employees are pre-approved to expense those costs associated with traveling for school-related purposes including testing and professional development. Scanned copies of original itemized receipts are required for reimbursement, regardless of the amount. The School shall not reimburse personal expenses including, but not limited to, alcohol, entertainment, laundry, expenses of any family member who is accompanying the employee on school-related business, personal use of an automobile, and personal losses or traffic violation fees incurred while on school business. Factors such as variances in regional costs, travel duration and extenuating circumstances will be considered when approving travel reimbursement. Associated travel fees such as parking fees, taxis/shuttles, and luggage handling are reimbursable expenses.

#### 3. Mileage

The mileage reimbursement rate is based on the rate established by the Internal Revenue Service. Employees must include verification of miles driven either using a platform adopted by the School, or by attaching a Mapquest/Google map or the like, with the request for reimbursement.

#### 4. Hotel Rooms

Lodging shall be for those days associated with attending the activity, including, if necessary, the night before. Good judgment shall be used to seek the most reasonable accommodations. In most cases, the School will assist employees with hotel and travel arrangements. For employees making their own reservations, hotel rooms are reimbursed for employees traveling over 80 miles one way. Typically, a hotel stay for a distance less than 80 miles from the employee's home, will require prior approval.

#### 5. Meals

Employees who are required to work or participate in training away from the regular work location may be reimbursed the cost of meal(s). Meals provided in

conjunction with conferences, workshops, seminars, meetings that exceed these amounts are excluded from these limitations. No meals will be reimbursed for meals provided at/during the conference/training.

The reimbursement rates are:

\$20 for breakfast, \$25 for lunch, \$35 for dinner plus service gratuity maximum of 18%. The total amount reimbursed for meals per day will not exceed \$80. Alcohol is not reimbursable and must be deducted from any reimbursement requests. If an employee exceeds the allotment for meal expenses, the balance above the daily allocation will be deducted from the total expense on the expense report.

#### 6. Postage

Employees will be reimbursed for any postage related expense requested by the School. Employees must get preapproval from a supervisor for shipping expenses and must discuss the best shipping method with the supervisor.

#### 7. Procedure for Expensing

Employees must have pre-approval prior to making any purchases that will warrant reimbursement. Approval may be obtained by sending an email to the CEO or designee with a short description of what will be purchased.

Expense reimbursements must be submitted within thirty (30) days of the charge. Expense reports submitted after this time may not be reimbursed within the current cycle and/or may be delayed and processed in the next cycle.

## Section VIII: Leaves, Vacation, and Holidays

### A. Healthy Workplaces/Healthy Family Act of 2014

The School, in compliance with the Healthy Workplaces/Healthy Family Act of 2014 (AB 1522), allows all full time and part time employees who work at least 30 days within a year in California to accrue paid sick leave hours. Accrual begins on the first day of employment. The employee must work at least 30 days before taking any available accrued sick leave.

### B. Paid Sick Leave

Paid sick leave may be used for an employee's own illness, for preventative care or diagnosis, care or treatment of an existing health condition, or time off to care for an ill or injured family member or dependents, which include children, parents, parent-in law, spouse, registered domestic partner, grandparents, grandchildren, siblings and those related to the employee by blood or affinity equivalent. Sick leave may also be used when an employee needs to manage matters surroundings



domestic violence, sexual assault, stalking or when their worksite or their child's school or daycare closes due to public health emergencies. Except in the case of an illness or emergency, sick leave must be requested at least five (5) days in advance by submitting the request through the payroll system. Employees using extended sick leave (in excess of 5 days) must submit a request at least two weeks before the extended leave.

Employees requesting sick leave may be required to submit a health care provider's statement or, in cases of individuals with sincerely held religious beliefs in faith healing or comparable religious practices, a statement authorized under EEOC guidelines, stating the reason for absence and dates of illness. Employees absent more than five (5) days may be required to submit a health care provider's statement or note that the employee is fit for return to service.

Employees will be paid their regular compensation when using paid sick days. Employees may use sick leave in thirty minute minimum increments, which will be deducted from the employee's accrual balance. Employees are not required to find a replacement for their work while taking protected sick time. Paid sick day balances are available for employee review through the payroll system and on pay stubs. For all hours submitted as sick leave, the time will be uninterrupted and the work day schedule will not need to be adjusted to accommodate the absence.

Any unused sick hours will roll over from year to year. Sick leave hours will not be advanced to an employee ahead of the earned accrual rate. Accrued, but unused sick days are not paid out by the School at the time of separation. However, employees who terminate employment and are rehired within one (1) year of termination (or 6 months for employees working in the city of San Diego) regain their previously unused accrued sick leave. Certificated employees who separate from CalPac and whose sick leave was transferred to another school, will have their transfer sick leave applied once the sick leave transfer form has been returned by the former school.

Any employee who continues to be absent after their sick leave accrual has been exhausted may have a payroll deduction equivalent to the number of hours absent. Salaried employees will only have full day absences deducted from their paycheck once their sick leave accrual is exhausted.

Certificated teaching staff are required to prepare and submit substitute lesson plans and other materials necessary in advance of any absence to ensure continuity of instruction during their absence. Teachers and certificated administrators may serve as substitute support to other teachers during absences by providing instruction for homeroom or content sessions.

## 1. Paid Sick Leave



The School provides sick pay for employees who regularly work a minimum of 24 hours per week. All full time employees (80% FTE or greater) accrue one (1) sick day per month in paid status. Employees paid semi-monthly will accrue the equivalent of one half day per pay period. All employees who fall under this accrual method are guaranteed to accrue a minimum of 24 hours by the 120<sup>th</sup> day of employment and subsequent accrual years in accordance with State law. Employees start accruing hours on the first day of employment and must work for 30 days before they can take sick leave. Employees will be paid at their regular hourly rate when they take paid sick leave.

Sick Leave Accrual					
Sick Leave	FTE	Hours Worked Per Week	Non-Exempt: Per Pay Period	Exempt: Per Pay Period	Total Sick Hours Accrued Monthly
Tier 2	.80 to 1.0 FTE	32+ hours	4/4	8	8
Tier 1	.60 to .79 FTE	24-31.9 hours	3/3	6	6

2. Paid Sick Leave – Part Time, Per Diem, Seasonal, and Temporary Employees

The School provides all part-time (less than 60% FTE), per diem, seasonal and temporary employees who work at least 30 days in California within a year with at least 24 hours (3 days) of paid sick leave in a 12 month period. Employees will be paid at their regular hourly rate when they take paid sick leave.

Employees start accruing hours on the first day of employment and must work for 30 days before they can take sick leave. Employees earn at least 1 hour of paid leave for every 30 hours worked. Employees may accrue more than 24 hours (3 days) of paid sick leave in a year. Sick leave accrual will be capped at 48 hours (6 days), in compliance with both state and city ordinances.

Sick Accrual <i>Part Time, Per Diem, Seasonal, and Temporary Employees</i>					
Sick Leave	Full Time Equivalent (FTE)	Hours Worked Per Week	Non-Exempt: Per Pay Period	Exempt: Per Pay Period	Total Sick Hours Accrued Monthly
California Sick Leave Policy	.59 or less	23.6 or less	2/2	-	4

## C. California State Benefits (PFL)

California State Disability Insurance (SDI) is funded through employee contributions and is designed to provide eligible workers with partial wage replacement when taking time off work for their non-work-related illness or injury, pregnancy, or childbirth.

California Paid Family Leave (PFL) provides employees residing in the State of California with the ability to access their State Disability Insurance for partial wage replacement benefits to care for a seriously ill child, parent, parent-in-law, grandparent, grandchild, sibling, spouse, or registered domestic partner, or to bond with a new child by birth, adoption, or foster care placement.

PFL Military Assist benefits are available to eligible employees who request time off work to participate in a qualifying event due to the military deployment of their spouse, registered domestic partner, parent, or child to a foreign country.

Employees must notify HR of their plan to take leave and the reason for taking leave according to the School's policy. HR is available to assist employees with applying for State Disability benefits through the Employment Development Department. Employees may be eligible to receive PFL benefits while on a leave of absence to care for a seriously ill family member or for baby bonding. Employees are not eligible for PFL benefits when on PDL, FMLA, or CFRA leave for their own serious health condition.

PFL is not a guaranteed right to a leave of absence, and employees taking PFL or PFL Military Assist are not provided job protection rights or a right to return to the same position following their absence.

## D. Pregnancy Disability Leave (PDL)

An employee may take pregnancy disability leave (PDL) if the employee is disabled because of pregnancy, childbirth, or a related medical condition, including prenatal care and severe morning sickness. The length of leave is dependent on a medical certification and the duration may be up to 17 1/3 weeks or the equivalent number of days the employee would normally work within the same period. Intermittent leave or a reduced work schedule may be taken.

### Employee Eligibility Criteria

To be eligible for pregnancy disability leave, the employee must be disabled by pregnancy, childbirth, or related medical condition and must provide appropriate medical certification concerning the disability.

### Events That May Entitle an Employee to Pregnancy Disability Leave

The 17 1/3 week pregnancy disability leave allowance includes any time taken (with or without pay) for any of the following reasons:

- The employee is unable to work at all or is unable to perform any one or more of the essential functions of their job without undue risk to self, the successful completion of pregnancy, or to other persons because of pregnancy or childbirth, or because of any medically recognized physical or mental condition that is related to pregnancy or childbirth (including severe morning sickness); or
- The employee needs to take time off for prenatal care.

#### Duration of Pregnancy Disability Leave

Pregnancy disability leave may be taken in one or more periods, but not to exceed four months total. "17 1/3 weeks" means the number of days the employee would normally work within that period. For example, a full-time employee who works five eight hour days per week, four months means 88 working and/or paid eight hour days of leave entitlement based on an average of 22 working days per month for four months.

PDL will run concurrently with other applicable leaves, such as FMLA leave. The 12-month look-back period will apply to all leaves granted concurrently.

#### 1. Pay During Pregnancy Disability Leave

An employee on pregnancy disability leave may use all accrued paid sick leave at the beginning of any otherwise unpaid leave period. The receipt of sick leave pay, or state disability insurance benefits will not extend the length of pregnancy disability leave.

Sick pay will accrue during any period of unpaid pregnancy disability leave only until the end of the month in which the unpaid leave began. For example, an employee who delivers their baby on March 5 and goes out on leave on that date, would earn one day of sick leave for the month of March. Accrual for leave would be suspended until the employee returns from leave. All sick leave will be applied starting with the first day of absence until the leave is exhausted.

#### 2. Health Benefits

The provisions of various employee benefit plans govern continued eligibility during pregnancy disability leave and these provisions may change from time to time. When a request for pregnancy disability leave is granted, the School will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

If the employee takes pregnancy disability leave and is eligible under the Family Medical Leave Act (FMLA), the School will maintain group health insurance coverage for up to a maximum of 12 workweeks (if such insurance was provided before the leave was taken) on the same terms as if the employee had continued to work after PDL ended. Leave taken under the pregnancy disability policy runs concurrently with FMLA under federal law, but not California Family Rights Act (CFRA). If the employee is ineligible under the federal and state family and medical leave laws, while on pregnancy disability they will receive continued paid coverage on the same basis as other medical leave that the School may provide and for which the employee is eligible, such as continued PDL. In some instances, the School may recover premiums it paid to maintain health coverage for the employee if they fail to return to work following pregnancy disability leave.

### 3. Medical Certifications

An employee requesting a pregnancy disability leave must provide a medical certification from their healthcare provider on a form supplied by the School. Failure to provide the required certification in a timely manner (within fifteen (15) days of the leave request) may result in a denial of the leave request until such certification is provided.

Re-certifications are required if leave is sought after expiration of the time estimated by the healthcare provider. Failure to submit required re-certifications can result in termination of the leave.

### 4. Requesting and Scheduling Pregnancy Disability Leave

An employee should request pregnancy disability leave by contacting HR.

The employee should provide at least thirty (30) days notice or as long of notice as is practicable, if the need for the leave is foreseeable.

Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt the School's operations.

Pregnancy disability leave may be taken intermittently or on a reduced leave schedule when medically advisable, as determined by the employee's healthcare provider.

If an employee needs intermittent leave or leave on a reduced schedule that is foreseeable based on planned medical treatment, the employee may be transferred temporarily to an available alternative position for which the employee is qualified, which has equivalent pay and benefits that better accommodates recurring periods

of leave than the employee's regular position.

In most cases, the School will respond to a pregnancy disability leave request within two (2) days of acquiring knowledge that the leave qualifies as pregnancy disability and, in any event, within ten (10) days of receiving the request. If a pregnancy disability leave request is granted, the School will notify the employee in writing and leave will be counted against the employee's pregnancy disability leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

#### 5. Return to Work

An employee on pregnancy disability leave remains an employee of the School and a leave will not constitute a break in service. When an employee returns from pregnancy disability leave, the employee will return to their original job or an equivalent job with equivalent pay, benefits, and other employment terms and conditions as when the leave commenced.

If the employee is not reinstated to the original position, the employee will be reinstated to a comparable position unless there is no comparable position available or a comparable position is available, but filling that position with the returning employee would substantially undermine the School's ability to operate the business safely and efficiently. A "comparable" position is a position that involves the same or similar duties and responsibilities and is virtually identical to the employee's original position in terms of pay, benefits, and working conditions.

#### 6. Employment During Leave

An employee on pregnancy disability leave may not accept employment with any other employer without the School's written permission. An employee who accepts such employment will be deemed to have resigned from employment with the School.

#### 7. State Benefits

California State Disability Insurance (SDI) and California Paid Family Leave (PFL) are designed to provide eligible workers with partial wage replacement when taking time off work for their own serious medical condition, to care for a child, parent, parent-in-law, grandparent, grandchild, sibling, spouse, registered domestic partner or to bond with a new child. Although it provides monetary benefits, it does not provide job protection rights. For more information or to file a SDI or PFL claim, please contact HR.

#### 9. Pregnancy Related Accommodation

California Pacific Charter Schools will provide reasonable accommodation to

pregnant employees for known limitations related to pregnancy, childbirth, or other related medical conditions in accordance with the federal Pregnant Workers Fairness Act (PWFA).

If you require an accommodation, notify the Director of Human Resources. If the need for a particular accommodation is not obvious, you may be asked to include relevant information such as:

- The reason you need an accommodation.
- A description of the proposed accommodation.
- How the accommodation will address limitations caused by pregnancy, childbirth, or related medical conditions.

The School will not require you to accept any accommodation without engaging in the interactive process to accurately understand your limitations and explore potential accommodations. The School is not required to make your specific requested accommodation and is not required to provide any accommodation that would constitute an undue hardship on the School.

If leave is provided as a reasonable accommodation, it may run concurrently with leave under the federal Family and Medical Leave Act and/or any other leave where permitted by law. The School will comply with state or local laws that provide additional protections beyond the PWFA. The School will not retaliate against employees who request or receive an accommodation under this policy.

#### 10. Lactation Accommodation

The School will provide a lactation break for a reasonable amount of time to accommodate an employee's need to express breast milk. Employees in need of lactation breaks should contact their supervisor and human resources to allow for the School to determine a private space and ensure the reasonable time for breaks is provided. Human Resources and the supervisor will assist the employee in identifying a proper location that is close to the employee's work area, shielded from view, and free from intrusion. Additionally, where applicable, the School will provide access to a sink with running water and a refrigerator for storing breast milk.

The lactation break shall, if possible, run concurrently with any rest break or meal period already provided to the employee. For non-exempt staff, any additional time needed to express milk outside of the normal rest break and meal period is to be off the clock. If the employee needs additional time past the breaks typically provided in a day, the employee should contact their supervisor and human resources. If a space and break is not provided when requested, please contact human resources.

## E. Family and Medical Leave Act and California Family Rights Act Policy

The School complies with the federal Family and Medical Leave Act (“FMLA”) and the California Family Rights Act (“CFRA”). The following information provides employees with a general description of their FMLA and CFRA rights.

### Calculating 12-Month Period for FMLA and CFRA

For purposes of calculating the 12-month period during which 12 weeks CFRA or qualifying exigency leaves may be taken, the School uses the “rolling” method also known as the look back method. For example, if an employee begins their leave on March 5, the look back period is 12 months from that date.

Under some circumstances, leave under FMLA and CFRA may run at the same time and the eligible employee will be entitled to a total of 12 weeks of family and medical leave in the designated 12-month period. Accrued sick leave will be paid to the employee starting with the first day of absence until exhausted and will run concurrently with FMLA and/or CFRA leave.

For leave to care for a covered service member, the 12-month period begins on the first day of the leave, regardless of how the 12-month period is calculated for other leaves. Leave to care for a covered service member is for a maximum of 26 workweeks during a 12-month period.

Leave granted under any of the reasons provided by state and federal law will be counted as FMLA and/or CFRA leave and will be considered as part of the 12-workweek entitlement (26-work week entitlement if leave is to care for a service member) in a 12-month period. The 12-month period is measured forward from the date any employee’s first FMLA/CFRA leave begins. Successive 12-month periods commence on the date of an employee’s first use of such leave after the preceding 12-month period has ended. No carryover of unused leave from one 12-month period to the next 12-month period is permitted.

### Pregnancy, Childbirth or Related Conditions Under FMLA, CFRA and PDL

Time off due to pregnancy disability, childbirth or related medical condition falls under pregnancy disability leave (PDL) and FMLA leave and is not concurrent with CFRA leave. Employees who may not be eligible for FMLA leave may still be eligible for leave under PDL. Once the employee is no longer disabled, or once the employee



has exhausted PDL and has given birth, they may apply for leave under CFRA, for purposes of baby bonding.

## 1) Family Medical Leave Act (FMLA)

### Employee Eligibility Criteria

FMLA leave provides up to 12 workweeks of unpaid, job protected leave within a 12-month period, under the following conditions:

- The employee must have been employed by the School for at least twelve (12) months,
- The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and
- The employee is employed at a location where the School has at least fifty (50) employees within a seventy-five (75) mile radius, except for purposes of baby-bonding where the threshold is twenty (20) employees.

FMLA leave may be taken for one or more of the following reasons:

1. The birth of the employee's child, or placement of a child with the employee for adoption or foster care. When both parents are employed by the School, and request simultaneous leave for the birth or placement for adoption or foster care of a child, the School will not grant more than a total of 12 workweeks of FMLA leave for this reason.
2. Due to the employee's own serious health condition causing the employee to be unable to perform one or more of the essential functions of their job. This excludes a disability caused by pregnancy, childbirth, or related medical conditions, as they are covered by the School's pregnancy disability policy.
3. To care for the employee's family member including a spouse, registered domestic partner, child, or parent who has a serious health condition or military service-related injury. When an employee is providing care for an injured spouse, child, parent, or next of kin who is a covered Armed Forces service member, the employee may take a maximum of twenty-six (26) weeks of FMLA leave in a single twelve (12) month period.

### Intermittent Leave under FMLA

Full-time employees may take leave of up to 12 workweeks in a rolling 12-month period. Part-time employees may take leave on a proportional basis. The leave does not need to be taken in one continuous period of time. Under FMLA, the employee must have the School's agreement to take intermittent leave.

## 2) California Family Rights Act (CFRA)

The Fair Employment and Housing Act (FEHA), enforced by the Department of Fair Employment and Housing (DFEH), contains family care and medical leave provisions



for California employees. CFRA applies to all employees of the state of California and any other political or civil subdivision of the state and cities, regardless of the number of employees.

### Employee Eligibility Criteria

CFRA leave provides up to 12 workweeks of unpaid, job protected leave within a 12-month period, under the following conditions:

- The employee has more than 12 months of service.
- The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and
- The employee is employed at a worksite where there are 5 or more employees within a 75 mile radius.

CFRA leave may be taken for one or more of the following reasons:

1. The birth of the employee's child, or placement of a child with the employee for adoption or foster care. If the School employs both parents of a child, it will grant up to 12 weeks of leave to each employee.
2. To care for the employee's parent, parent-in-law, spouse, registered domestic partner, child, grandparent, grandchild, and sibling who has a serious health condition.
3. For a serious health condition that renders the employee unable to perform their job.
4. To care for the employee's family member including a spouse, registered domestic partner, child, or parent who has a military service-related injury, or a designated person (person who is related to the employee by blood or whose association with the employee is equivalent to a family relationship). Employees are limited to the use of CFRA leave for one designated person per 12 month period. When an employee is providing care for an injured spouse, child, parent, or next of kin who is a covered Armed Forces service member, the employee may take a maximum of twenty-six (26) weeks of CFRA leave in a single twelve (12) month period.

### Intermittent Leave under CFRA

Full-time employees may take leave of up to 12 workweeks in a rolling 12-month period. Part-time employees may take leave on a proportional basis. The leave does not need to be taken in one continuous period of time. Employees do not need the School's agreement to take intermittent bonding leave. In the case of intermittent leave, the employee may be required to use such leave in two-week minimum increments, with an exception for shorter increments on at least two occasions.

### 3) Process for Requesting FMLA/CFRA Leave Leave Procedures

The following procedures shall apply when an employee requests leave:

The employee must contact HR as soon as the need for the leave is realized.

If the leave is based on the expected birth, placement for adoption or foster care, or planned medical treatment for a serious health condition of the employee or an eligible family member per FMLA or CFRA, the employee must notify the School at least 30 days before the leave is to begin. The employee must consult with their supervisor regarding scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of the School. Any such scheduling is subject to the approval of the health care provider of the employee or the health care provider of the applicable family members.

If the employee cannot provide 30 days' notice, the School must be informed as soon as is practical. Notice can be written or verbal and should include the timing and the anticipated duration of the leave, but the School does not require disclosure of an underlying diagnosis. The School will respond to a leave request within 5 business days. The School requires written communication from the health-care provider stating the reason for the leave and the probable duration of the condition. However, the health care provider may not disclose the underlying diagnosis without the consent of the patient.

If the FMLA/CFRA leave request is made because of the employee's own serious health condition, the School may require, at its expense, a second opinion from a health care provider that the School chooses. The health care provider designated to give a second opinion will not be one who is employed on a regular basis by the School.

If the second opinion differs from the first opinion, the School may require, at its expense, the employee to obtain the opinion of a third health care provider designated or approved jointly by the employer and the employee. The opinion of the third health care provider shall be considered final and binding on the School and the employee. While waiting for a second or third opinion, the employee is provisionally entitled to FMLA/CFRA leave.

The School requires the employee to provide certification within 15 days of any request for FMLA/CFRA, unless it is not practicable to do so. The School may require recertification from the health care provider if additional leave is required. For example, if an employee needs two weeks of family and medical leave, but following the two weeks needs intermittent leave, a new medical certification will be requested and required. If the employee does not provide medical certification in a timely manner to substantiate the need for leave, the School may delay approval of the leave, or continuation thereof, until certification is received. If certification is

never received, the leave may not be considered family and medical leave.

If the leave is needed to care for approved family members per FMLA/CFRA, the employee must provide a certification from the health care provider stating:

1. Date of commencement of the serious health condition;
2. Probable duration of the condition;
3. Estimated amount of time for care by the health care provider; and
4. Confirmation that the serious health condition warrants the participation of the employee.

#### Certification

If an employee cites their own serious health condition as a reason for leave, the employee must provide a certification from the health care provider stating:

- 1) Date of commencement of the serious health condition;
- 2) Probable duration of the condition; and
- 3) Inability of the employee to work at all or perform any one or more of the essential functions of their position because of the serious health condition.

The School will require certification by the employee's health care provider that the employee is fit to return to their job. Failure to provide certification by the health care provider of the employee's fitness to return to work may result in denial of reinstatement for the employee until the certificate is obtained.

#### 4) Pay and Benefits Under FMLA/CFRA

##### Health and Benefit Plans

The School provides health benefits under a group plan, and will therefore continue to make these benefits available during the leave if the employee is enrolled in the group plan. An employee taking FMLA/CFRA leave will be allowed to continue participating in any health and welfare benefit plans in which they were enrolled before the first day of the leave (for a maximum of 12 workweeks, or 26 workweeks if the leave is to care for a covered service member) at the level and under the conditions of coverage as if the employee had continued in employment for the duration of such leave. The School will continue to make the same premium contribution as if the employee had continued working. The continued participation in health benefits begins on the date leave first begins. In some instances, the School may recover from employee premiums paid to maintain health coverage if the employee fails to return to work following family/medical leave. An employee is deemed to have "failed to return from leave" if they do not return following the leave

of absence, or work less than thirty (30) days after returning from leave. Employees on pregnancy disability leave will be allowed to continue to participate in group health coverage for up to a maximum of four months (or for the approved time) of pregnancy disability leave (if such insurance was provided before the leave was taken) on the same terms as if the employee had continued to work. The employee will also continue to make premium payments, if applicable, based on the payment schedule outlined in the premium payment letter. They will then be able to remain on benefits for any time taken under approved FMLA/CFRA leave if they are eligible for those leaves. Payment is due when it would be made by payroll deduction.

#### Substitution of Paid Leave

Generally, FMLA/CFRA leave is unpaid. The School is not required to pay employees during FMLA/CFRA leave and may require an employee to use accrued vacation time or other accumulated paid leave other than sick time. If the FMLA/CFRA leave is for the employee's own serious health condition the use of sick time is required and will run concurrent with FMLA/CFRA leave.

#### Time Accrual

Sick pay will accrue during any period of unpaid disability leave only until the end of the month in which the unpaid leave began. For example, an employee who delivers their baby on March 5 and goes out on leave on that date, would earn one day of sick leave for the month of March. Accrual for leave would be suspended until the employee returns from leave. All sick leave will be applied starting with the first day of absence until the leave is exhausted.

#### COBRA Benefits

If an employee requires additional leave after all protected leaves have been exhausted (PDL, FMLA, CFRA), they will be eligible for continued benefits through COBRA.

#### 5) Reinstatement Upon Return from FMLA/CFRA

Under most circumstances, upon return from FMLA/CFRA leave, an employee will be reinstated to their original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions as when the leave commenced. However, an employee has no greater right to reinstatement than if they had been continuously employed rather than on leave. For example, if an employee on FMLA/CFRA leave would have been laid off had they not gone on leave, or if the employee's job is eliminated during the leave and no equivalent or comparable job is available, then the employee would not be entitled to reinstatement. In addition, an employee's use of FMLA/CFRA leave will not result in the loss of any employment benefit that the employee earned before using family/medical leave.

Reinstatement after FMLA leave may be denied to certain salaried “key” employees under the following conditions:

- 1) An employee requesting reinstatement was among the highest-paid 10 percent of salaried employees employed within 75 miles of the work site at which the employee worked at the time of the leave request;
- 2) The refusal to reinstate is necessary because reinstatement would cause substantial and grievous economic injury to the School’s operations;
- 3) The employee is notified of the School’s intent to refuse reinstatement at the time the School determines the refusal is necessary; and
- 4) If leave has already begun, the School gives the employee a reasonable opportunity to return to work following the notice described previously.

Under CFRA, the School will reinstate “key” employees.

Employees should contact HR for additional information about eligibility for FMLA, CFRA or PFL.

## F. Bereavement Leave

Employees are eligible for bereavement leave after 30 days of continuous employment. An employee requesting bereavement leave should notify their supervisor as soon as possible for support in ensuring release time and coverage of their duties. If an employee receives notice of the death of a family member while at work, the employee may be excused from their regularly scheduled duties for the remainder of the workday and that day will not count as bereavement leave. The employee will be paid for that day as if they had completed the full workday.

Paid bereavement leave will be granted according to the following schedule:

- Employees are allowed up to ten (10) consecutive days off from regularly scheduled duty with regular pay in the event of the death of the employee’s spouse, domestic partner, child, or stepchild.
- Employees are allowed up to five (5) consecutive days off from regularly scheduled duty with regular pay in the event of the death of the employee’s parent, stepparent, parent-in-law, brother, sister, stepsibling, or an adult who stood in loco parentis to the employee during childhood.
- Employees are allowed one (1) day off from regularly scheduled duty with regular pay in the event of the death of the employee’s extended family member (i.e. sister/brother-in-law, aunt, uncle, or cousin).
- Employees are allowed up to four (4) hours of bereavement leave to attend the funeral of a fellow CalPac employee or the employee’s close personal friend.

Bereavement leave may be taken intermittently with prior approval of the supervisor in no less than four hour increments. If an employee requires more than the allocated time off for bereavement leave, the employee may use accumulated sick days and/or vacation time (if applicable). Nonwork days or holidays will not count as bereavement leave. Employees may take the equivalent of one additional day of bereavement leave for the purpose of travel if the services are located out of state. The CEO or designee may approve additional unpaid time off with preapproval.

Bereavement pay is calculated based on the base pay rate at the time of absence, and it will not include any special forms of compensation, such as incentives, commissions, bonuses, overtime, or shift differentials. Employees under discipline for attendance issues may be required to provide documentation with regard to their bereavement leave.

## G. Military Leave

Regular full time employees requiring a leave of absence for service in the uniformed services are provided leave and will be re-employed at the end of the leave. Policies governing this leave are designed according to the Uniformed Services Employment and Reemployment Rights Act and applicable state regulations. The policy covers those employees who enter active military duty voluntarily and extends to Reservists and National Guard members who are called to limited active duty or extended training duty, including regularly scheduled annual training and military summer camp training.

### Eligibility

All employees, except those hired on a temporary or seasonal basis, are eligible for the leave.

### Length of Leave

The length of the military leave is determined by the uniformed service organization calling the employee to active duty or military encampment.

### Request Procedure

The employee must provide written notice of their obligation or intention to perform service in the uniformed services, unless notice is precluded by military necessity or is otherwise unreasonable or impossible. A copy of the military orders must also be provided. Failure to do so may result in loss of reemployment rights.

### Pay While on Leave

Military leaves are without pay.

### Status of Benefits

Reservists, National Guard members, and veterans returning from military service in the Armed Forces have and retain rights with respect to seniority, vacation, compensation, length of service, pay increases, as may be from time to time provided by applicable statutes of the United States and the state of California. The employee may maintain health care insurance benefits for up to 24 months while on leave by paying the insurance premiums through COBRA for any leave extending beyond 30 days.

### Reinstatement

Upon return from a Uniformed Service Leave, the employee must report to work or request reemployment within prescribed time limits, which are based on the length of the leave:

1. Between one (1) to thirty (30) days: The service member is expected to report to work on the first regularly scheduled work period on the first full day after release from service and will be reinstated to the same position held at the time the service leave began.
2. Between 31-180 days: The service member must submit an application for reemployment within 14 days of release from service.
3. For 181 days or longer: An application for reemployment must be submitted within 90 days of release from service.

Failure to file an application within the required time period may forfeit the right to reemployment.

## H. Organ and Bone Marrow Donation Leave

The Organ and Bone Marrow Donation Leave grants up to 30 days leave of absence with pay to employees who have exhausted all available sick leave within a one-year period for the purpose of donating an organ and a five (5) day leave of absence with pay to employees who are bone marrow donors. If needed, employees may take an additional unpaid leave of absence, up to 30 days per year, for donating an organ.

This leave may require use of two weeks accrued paid time off for organ donation, and five (5) days for bone marrow donation.

A medical note will be required to be submitted to HR. Medical benefits will be maintained while the staff member is on leave and the staff member is guaranteed reinstatement to work. There will be no discrimination or retaliation for any leave taken.



## I. Judicial Leave

The School encourages employees as part of their civic responsibilities to serve on jury duty when called. The School provides judicial leave to eligible employees who are called to serve as jurors or who are summoned to appear as witnesses in a judicial proceeding, pursuant to a subpoena, or a court order. Postponement to non-instructional or off-peak department times such as the start or end of the school year, during state testing windows, at the end of grading periods, or for departments during significant high volume periods is encouraged in order to minimize the impact to the School's operations.

- Seasonal and part-time employees working less than 24 hours per week will be provided unpaid time off to participate in jury duty.
- Regular classified and certificated employees will receive their full pay while serving up to seven (7) days of judicial leave. The seven days will be calculated as the equivalent to the employee's regular work schedule. For example, an employee who works six (6) hours per day would be eligible for a total of 42 hours of judicial leave.
- With pre approval from the supervisor, nonexempt employees may work an alternate schedule in coordination with their leave in order to maintain full or partial paid status for the duration of the leave in excess of seven (7) paid days if applicable.
- Exempt employees called for jury duty will receive full salary for the time spent on leave beyond the initial seven (7) days, unless they are on leave for an entire workday during which no work is performed. Exempt employees are expected to monitor and respond to any urgent communications within 24 business hours, perform any critical job duties, and must consult with their supervisor to ensure coverage of duties during their absence.

The employee must notify HR and their supervisor of the need for time off for jury duty as soon as a notice or summons from the court is received. Any employee summoned for jury duty must provide HR with an authentic summons, subpoena, or notice for such duty and upon returning to work must present proof of jury duty service, including the dates of the employee's service. Employees are expected to return to work if they are excused for jury duty during their regular working hours.

Fees Paid by the Court - All jury fees (excluding mileage) received by the employee while on school paid status shall be remitted to HR. Jury fees received while on school unpaid status are retained by the employee.

## J. Volunteer Firefighters, Reserve Police Officer or Emergency Rescue Personnel



If the employee is an official volunteer firefighter, a reserve police officer, or an emergency rescue personnel they must alert HR that it may be necessary to take time off due to emergency duty. No employee shall be disciplined for taking time off to perform emergency duty as a volunteer firefighter.

## K. Victims of Domestic Violence Leave

Employees who are victims of domestic violence are eligible for unpaid leave regardless of whether any person is arrested, prosecuted, or convicted of committing a crime. This leave provides time off for employees who are victims of domestic violence, sexual assault, and stalking, as well as leave for employees who are the victims or related to victims of certain serious or violent felonies. Employees may use available and accrued sick leave. The employee may also take paid vacation. The employee may request leave if they are involved in a judicial action, such as obtaining restraining orders, appearing in court to obtain relief to ensure the health, safety or welfare, or that of their child.

The employee should provide notice and certification if they need to take leave under this policy. Certification may be sufficiently provided by any of the following:

1. A police report indicating that the employee was a victim of domestic violence.
2. A court order protecting or separating the employee from the perpetrator of an act of domestic violence, or other evidence from the court or prosecuting attorney that the employee appeared in court.
3. Documentation from a medical professional, domestic violence advocate, health-care provider, or counselor that the employee was undergoing treatment for physical or mental injuries or abuse resulting in victimization from an act of domestic violence.

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

## L. Suspension of an Employee's Enrolled Child

If an employee who is the parent or guardian of a child facing suspension from school and is summoned to the school to discuss the matter, the employee should alert the CEO or designee as soon as possible before leaving work. In keeping with California Labor Code Section 230.7, no discriminatory action will be taken against an employee who takes time off for this purpose.

## M. Recreational Activities and Programs

The School or its insurer will not be liable for payment of workers' compensation

benefits for any injury that arises out of an employee's voluntary participation in any off-duty recreational, social, or athletic activity that is not part of the employee's work-related duties.

## N. Workers' Compensation

The School, in accordance with state law, provides insurance coverage for employees in case of a work-related illness or injury. The workers' compensation benefits provided to injured employees include:

- Medical care;
- Cash benefits, tax free, to replace lost wages; and
- Vocational rehabilitation to help qualified injured employees return to suitable employment.

To ensure that the employee receives any workers' compensation benefits to which they may be entitled, they will need to:

- Immediately report any work-related injury or illness to HR. If the employee believes the injury or illness is caused by their job and developed gradually, the report should be filed as soon as possible. Reporting promptly helps avoid problems and delays in receiving benefits, including medical care. If the employee does not report the injury within 30 days, they risk losing their right to receive workers' compensation benefits;
- Seek medical treatment and follow-up care if required;
- Complete a written claim form and return it to HR as soon as possible.
- Provide the School with a certification from the healthcare provider regarding the need for workers' compensation disability leave, as well as the status of the employee's eventual ability to return to work from the leave.

Upon submission of a medical certification that an employee is able to return to work after a workers' compensation leave, the employee under most circumstances will be reinstated to the same position held at the time the leave began, or to an equivalent position, if available. Upon return, a teacher is not guaranteed the same students, but will receive new/transfer students according to the same seniority status they had prior to the leave. An employee returning from a workers' compensation leave has no greater right to reinstatement than if the employee had been continuously employed rather than on leave. For example, if an employee on workers' compensation leave would have been laid off had they not gone on leave, or if the employee's position has been eliminated or filled in order to avoid undermining the School's ability to operate safely and efficiently during the leave, and no equivalent or comparable positions are available, then the employee would not be entitled to reinstatement.

An employee's return depends on their qualifications for any existing openings. If,

after returning from a workers' compensation disability leave, an employee is unable to perform the essential functions of the job because of a physical or mental disability, the School's obligations to the employee may include reasonable accommodation, as governed by the ADA (Americans with Disabilities Act).

## O. Other Types of Leaves

There are other types of leaves that employees may be eligible for which include:

- Time off to visit children's schools: This leave provides employees up to 8 hours per month (to a maximum of 40 hours per year) of unpaid time off for the purpose of child-related activities which include: to find, enroll, or re-enroll the child in a school or with a licensed childcare provider; to participate in activities of the school or licensed child care provider; to address a child care provider or school emergency. Employees may use available and accrued sick leave;
- Literacy accommodation leave: This leave provides reasonable accommodation for employees who experience difficulties with literacy to enroll in an adult literacy program, work with a tutor or otherwise take steps to improve upon their literacy needs. Employees may use available and accrued sick leave;
- Military spousal leave: This leave provides employees up to 10 days of unpaid, protected leave, to spend time with a spouse or registered domestic partner who is home during a period of military deployment. Employees may use available sick leave for the purpose of military spousal leave. Additionally, employees may be eligible for Paid Family Leave through the state of California or FMLA for this type of leave. Please contact HR for more information.
- Unpaid Personal Leave: An employee may need to take time off from work that is not covered by the available paid leave policies. In this case, the employee may submit a request to their supervisor for unpaid time off. Unpaid personal leave is limited to no more than four (4) days per fiscal year and must be preapproved by the supervisor. A day is calculated to mean the equivalent of the employee's workday. Except in emergency situations, unpaid leave will not be granted during the first two weeks of school, the last two weeks of school, during testing windows, or at other times deemed essential by the supervisor to ensure student instruction and/or school operations.

## P. Professional Development

The School expects all employees to maintain necessary certifications and encourages all employees to attend meetings, conferences, and other educational sessions that provide training and ideas helpful to the development or operation of the School. Employee requests to attend short-term professional development

opportunities (two days or less) not sponsored by the School are subject to the approval of the CEO or designee.

Employees will be allowed with the approval of their supervisor and the CEO or designee to attend extended professional development programs. Extended professional development programs are considered more than two (2) days. An employee will be expected to complete missed work or assignments upon return.

Employees may submit written requests for professional development days to their supervisors for approval. The request shall include a printed or written agenda and/or printed material pertaining to the professional development. The School requests that employees submit requests to take professional development days at least 10 days for in town events and at least 30 days for out of town events. The granting of request will be solely at the discretion of the CEO.

## Q. Holidays

The School recognizes the following holidays:

- New Year's Day (January 1st)
- Martin Luther King Jr's Birthday
- Presidents' Day
- Memorial Day
- Juneteenth (June 19th)
- Independence Day (July 4th)
- Labor Day
- Veterans Day
- Thanksgiving Day
- The Friday after Thanksgiving
- Christmas Eve (December 24th)
- Christmas Day (December 25th)
- New Year's Eve (December 31st)

Each year the winter break will be reviewed and the holidays determined by the beginning of the school year.

Unless otherwise provided in this policy, all employees will receive time off for each observed holiday. To qualify for holiday pay, an employee must be a regular full time or part time (twenty four or more hours per week) classified employee in paid status on the working day immediately preceding and following the holiday. A holiday that falls during a classified employee's vacation time or sick time is paid as a holiday and is not deducted from vacation or sick-leave balances. Employees required by their supervisor to work on a scheduled school holiday who are eligible for holiday pay, will in addition to holiday pay, receive compensation for the actual hours worked. Classified employees working at least 80% FTE will be compensated 8 hours for each observed school holiday falling within the employee's work year calendar. Classified employees working between 60% - 79% FTE will be

compensated 4.8 hours for each observed school holiday falling within the employee's work year calendar.

## R. Vacation

The School's vacation policy is intended to provide eligible staff with time off from work for rest, recreation, or to attend to personal matters. This policy is subject to change at the discretion of the School.

Vacation days must be requested and approved in advance of the time off from work. Employees must submit their request to their supervisor or manager through the leave system at least two (2) weeks prior to the requested time off, except in cases of unforeseeable circumstances. Vacation may be used in increments of no less than one (1) hour. Any changes to a vacation request must be pre-approved by the supervisor at least three (3) business days prior to the start of the requested date of vacation, except in an emergency situation. Approval of vacation days are subject to the needs of the school. A requested vacation will be approved if the absence does not cause a disruption of service or result in issues of coverage. Failure to obtain pre-approval for vacation may result in disciplinary action.

Employees will become eligible for vacation accrual after completing three (3) months of continuous service. Vacation time may not be utilized before it is earned. Accrued and unused vacation hours will roll over from year to year, but are capped at one and a half times (1.5) the employee's annual rate of accrual. Employees will not accrue any additional vacation until their balance has dropped below the annual cap. When some vacation is used, vacation compensation will begin to accrue again. There is no retroactive grant of vacation compensation for the period of time the accrued vacation compensation was at the cap.

Earned vacation accruals are displayed in the payroll system and on the employee's pay stub. Upon separation from the School, employees will be paid for any accrued, but unused vacation days in accordance with applicable laws and School policy.

### **(Certificated Employees)**

Certificated employees are entitled to vacation terms based upon date of hire, length of service, and status with the School. Certificated employees shall accrue three (3) days of paid vacation each year prorated based on FTE, length of employment, and percentage of time the employee was vacation eligible.

For certificated employees, requests for vacation will not be granted during the first two (2) weeks and last two (2) weeks of the school semester or during testing windows. The supervisor may determine additional peak times in which vacations may not be approved.

<b>Vacation Accrual</b> <i>Certificated Staff</i>			
<b>Eligibility Status</b>	<b>Full Time Equivalent (FTE)</b>	<b>Hours Worked Per Week</b>	<b>Total Annual Accrual</b>
Full Time Tier 2	.80+	32+	24 hours
Part Time Tier 1	.60 - .79	24-31	18 hours

**(Classified Employees)**

Classified employees are entitled to vacation terms based upon assignment FTE, date of hire, length of service, and status with the School. Vacation will accrue beginning on the first day in paid status, but may not be used until after completing three (3) months of continuous service. Employees may be required to apply their earned vacation hours during school recess.

As a general practice, the supervisor will make an effort to approve a vacation request that is mutually convenient for the employee and the School. The supervisor may determine peak times in which vacations may not be approved.

<b>Vacation Accrual</b> <i>Classified Staff</i>						
<b>Eligibility Status</b>	<b>Full Time Equivalent (FTE)</b>	<b>Hours Worked Per Week</b>	<b>Non-Exempt: Per Semi Monthly Pay Period</b>	<b>Exempt: Per Monthly Pay Period</b>	<b>Total Hours Accrued Per Month</b>	<b>Total Max Annual Accrual</b>
Full Time Tier 2	.80+	32+	4 hours/4 hours	8 hours	8 hours	96 hours
Part Time Tier 1	.60-.79	24-31 hours	1 hour/1 hour	2 hours	2 hours	24 hours

**(Classified Managers)**

Classified managers are entitled to vacation terms based upon assignment FTE, date of hire, length of service, and status with the School. Vacation will accrue beginning on the first day in paid status, but may not be used until after completing three (3) months of continuous service. Employees may be required to apply their earned vacation hours during school recess.

As a general practice, the supervisor will make an effort to approve a vacation request that is mutually convenient for the employee and the School. The supervisor may determine peak times in which vacations may not be approved.

<b>Vacation Accrual</b> <i>Classified Manager</i>						
<b>Eligibility Status</b>	<b>Full Time Equivalent (FTE)</b>	<b>Hours Worked Per Week</b>	<b>Non-Exempt: Per Semi Monthly Pay Period</b>	<b>Exempt: Per Monthly Pay Period</b>	<b>Total Hours Accrued Per Month</b>	<b>Total Max Annual Accrual</b>
Full Time Tier 2	.80+	32+	6 hours/6 hours	12 hours	12 hours	144 hours
Part Time Tier 1	.60-.79	24-31 hours	3 hour/3 hour	6 hours	6 hours	72 hours

## S. Work Year Calendars

Each year the Board of Directors will approve the instructional and work year calendars for the new school year. Specific work days for certificated staff are determined by the School based on a return date for prep days, professional development, and final date for grade submission. The work days will be designated within the date range listed on the employment agreement.

In coordination with HR, supervisors will prepare a work year calendar displaying the first and last day of the assignment, all recess periods, and designated non-work days. For employees working less than 12 months, non-work days will be determined at the discretion of the employer, indicated on a work calendar provided to the employee, and determined so that work schedules will provide the greatest support to the School or department.

Non-work days are unpaid days based upon the employee's position and employment agreement as stated on the work year calendar. Unlike accrued leave, non-work days will not carry over from year to year.

## T. Make-up Time

Nonexempt employees may choose to use make up time in order to accommodate employee scheduling needs. Employees may choose to work over 8 hours on one or more days per week, so they make up work less than 8 hours another day for personal reasons. The extra hours worked for make-up time would not be counted as overtime. Employees are not to work more than 11 hours in a single work day (without prior approval), and the make up time must all be taken and used within the pay work week. If an employee requests make-up time and has worked over 8 hours in a day earlier in the week, and their need for time off changes, the employer may still require the employee to take the planned time off to avoid unnecessary

overtime. Unless otherwise approved, employees are not to work more than 40 hours per week, in which case, they will be eligible for overtime. Requests for make up time must be submitted to the supervisor in advance.

## U. Suggestions

The School is always striving to improve operating procedures and encourages all employees to make suggestions to this end. We welcome suggestions on subjects such as safety; ways to improve customer service; and, how to save labor, money, energy, time, and materials. All suggestions should be submitted in writing to the appropriate supervisor who will in turn discuss them with School management. We appreciate staff suggestions that help make the School more successful.

## Section IX: Arbitration Agreement

### Agreement to Arbitrate Disputes and Claims

As a condition of employment, the School and employee shall enter into an agreement to submit to binding arbitration any and all disputes or employment claims they could otherwise pursue in court, with the exception of those areas not covered in the agreement by law. For additional information, refer to the Employment Agreement and the Arbitration Agreement documents.



**CALIFORNIA PACIFIC CHARTER SCHOOLS****Agenda Item:****Date:** August 8, 2023

	Correspondence/Proposals/Reports
X	Consent Agenda
	Business/Financial Services
	Education/Student Services
X	Personnel Services
	Curriculum
	Policy Development

**Item Requires Board Action:** \_\_\_\_\_ **Item is for Information Only:** \_\_\_\_\_**Item:** Approve updated Arbitration Agreement for Employment**Background:**

Recent court cases regarding employee rights in terms of Private Attorney General Act (PAGA) claims and mandatory arbitration agreements impact the school's arbitration policy. A PAGA claim allows an employee to sue their employer on behalf of the State for violations of the labor code. In the recent CA Supreme Court ruling, the court ruled that while employers may require employees to mandatory participation in arbitration as a condition of employment, employees have the right to file a PAGA claim regardless of an arbitration agreement. Upon legal advice, staff recommend adopting an updated agreement for distribution to all employees to replace the previous version for the purpose of being in compliance with the Court's ruling.

It is recommended the Board approve the updated Arbitration Agreement and direct staff to provide the revised document to all employees.

**Fiscal Impact:**

None

## ARBITRATION AGREEMENT

This ARBITRATION AGREEMENT (“Agreement”) is made by and between California Pacific Charter Schools (“Employer”) and \_\_\_\_\_ (“Employee”). The purpose of this Agreement is to establish final and binding arbitration for all disputes arising out of Employee’s relationship with Employer from the inception of the employment relationship, including, but not limited to, Employee’s employment or the termination of Employee’s employment, to the fullest extent permitted by applicable law. Employee and Employer desire to arbitrate their disputes on the terms and conditions set forth below to gain the benefits of a speedy, impartial dispute-resolution procedure, and pursuant to the Federal Arbitration Act (“FAA”). Employee and Employer agree to the following:

### 1. Claims Covered by the Agreement.

1.1 Employee and Employer both agree to exclusively and finally resolve by binding arbitration **any and all claims or controversies** (“claims”) that Employer may have against Employee or that Employee may have against Employer or against its past, present, or future predecessors, successors, assigns, affiliates, parent and *subsidiary* companies, joint ventures, pension or benefit plans, administrators, vendors, contractors, and their respective past, present, or future officers, directors, employees, stockholders, representatives, managers, members, partners, partnerships, agents, guests, parents, students, clients, suppliers, vendors, educational advisors, business advisors, financial advisors, attorneys, and accountants, insurers, and indemnitees (collectively, “Employer”), relating to, resulting from, or in any way arising out of this Agreement or the enforcement, interpretation or validity of this Agreement, including the determination of the scope or applicability of this Agreement, any aspect of Employee’s relationship with Employer, any aspect of Employee’s employment relationship with Employer (pre-hire through post-termination), and/or the termination of Employee’s employment relationship with Employer, and/or any act or omission between Employee and Employer to the extent permitted by law. **This Agreement does not cover any claim, cause of action, or actions pursuant to workers’ compensation laws, unemployment insurance benefits with the Employment Development Department, or any other dispute if an agreement to arbitrate such a dispute is prohibited by law.** Further, nothing in this Agreement precludes Employee from pursuing any administrative agency claims, including, but not limited to, claims with the Department of Fair Employment and Housing, the Equal Employment Opportunity Commission, the Division of Labor Standards Enforcement, the Department of Labor, and/or the California Public Employment Relations Board.

1.2 The scope of this Agreement is intended to be broad and comprehensive and includes, without limitation, claims for wages or other compensation, including reimbursements, due; claims for penalties or premiums; claims for violations of the California Labor Code; claims for breach of any contract or covenant (express or implied); tort claims (including, but not limited to, those relating to performance or reputation); claims for discrimination, harassment, and/or retaliation (including, but not limited to, race, religious creed (which includes religious dress and grooming practices), color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), gender, gender identity, gender expression, age, sexual orientation, military or veteran status, or any other consideration made unlawful by federal, state or local laws, ordinances, or regulations); claims for violation of any leaves of absence or accommodations laws; claims for wrongful termination or whistleblowing; claims for benefits (except where an employee benefit or pension plan specifies that its claims procedure shall culminate in an arbitration procedure different from this one); claims for violation of

trade secret, proprietary, or confidential information laws; claims for unfair business practices; claims for invasion of privacy; and claims for violation of any public policy, federal, state, or other governmental law, statute, regulation, or ordinance.

- 1.3 To the fullest extent permitted by law, Employer and Employee agree that for any claim brought on an individual basis, including under the Private Attorneys General Act of 2004, California Labor Code § 2698, *et seq.* (“PAGA”), any such dispute shall be resolved in arbitration on an individual basis (*i.e.*, to resolve whether Employee has personally been aggrieved or subject to any violations of law). To the extent there are any PAGA claims to be litigated in a court of competent jurisdiction, including any representative claims, the Employer and Employee agree that litigation of those claims shall be stayed pending the outcome of any individual claims in arbitration, regardless of which claims or actions were filed first. If any provision of this section is found to be unenforceable or unlawful for any reason, the unenforceable provision shall be severed from this arbitration provision and severance of the unenforceable provision shall have no impact whatsoever on the Agreement as a whole, which shall remain enforceable as to all other terms.

## 2. Arbitration Procedures.

- 2.1 Required Notice of Claims and Statute of Limitations. Employee may initiate arbitration by serving or mailing a written notice to the Executive Director of Employer at Employer’s principal place of business. Employer may initiate arbitration by serving or mailing a written notice to Employee at the last address recorded in Employee’s personnel file. The written notice must specify with reasonable particularity the claims asserted against the other party. Notice of any claim sought to be arbitrated must be served within the limitations period established by applicable federal or state law. After demand for arbitration has been made by serving written notice, the party demanding arbitration shall file a demand for arbitration with the Office of JAMS located within 50 miles of (i) the last address recorded in Employee’s personnel file or (ii) the JAMS closest to the last Employer worksite with which Employee most regularly communicated, whichever is closer. The location of the arbitration is determined in accordance with Section 2.8. Applicable law is determined in accordance with Section 2.6.
- 2.2 Selection of Arbitration and Applicable Rules. The arbitrator shall be selected within sixty (60) days of the party initiating arbitration under Section 2.1 from the panel of JAMS and the arbitration shall be conducted pursuant to JAMS policies and procedures. Except as provided herein, all rules governing the arbitration shall be the then-applicable rules set forth by JAMS. If the dispute is employment-related, the dispute shall be governed by JAMS’s then-current version of the national rules for the resolution of employment disputes, with the exception that discovery and motions for summary judgment will be governed by Sections 2.3 and 2.4 of this Agreement. JAMS’s then-applicable rules governing the arbitration may be obtained from JAMS’s website, which currently is [www.jamsadr.com](http://www.jamsadr.com).
- 2.3 Discovery and Motions. The parties shall be entitled to engage in all types of discovery (e.g., depositions, interrogatories, request for production of documents, etc.) regarding and relevant to the subject matter of the dispute submitted to arbitration pursuant to the Federal Rules of Civil Procedure (“FRCP”), including but not limited to, FRCP 26. A copy of the FRCP may be obtained from the website of the United States Courts, which is currently <http://www.uscourts.gov/rules-policies/current-rules-practice-procedure/federal-rules-civil-procedure>. The arbitrator is authorized to rule on discovery motions brought under the FRCP. All discovery must be completed no later

than twenty (20) days prior to the date set for the arbitration hearing; provided, however, that no discovery may be initiated until after the dispute has been formally submitted to arbitration and an arbitrator has been mutually agreed-upon.

- 2.4 Dispositive Motions. Either party may file a motion for summary judgment with the arbitrator in accordance with Rule 56 of the FRCP.
- 2.5 Offers Of Judgment. Either party may serve an offer of judgment consistent with the FRCP.
- 2.6 Applicable Law and Arbitrator Authority. The arbitrator shall apply the substantive law (and the law of remedies, if applicable) of the state in which the claim arose, or federal law, or both, as applicable to the claim(s) asserted. **The arbitrator shall have exclusive authority to resolve any dispute relating to the interpretation, applicability, enforceability, or formation of this Agreement, including, but not limited to, any claim that all or any part of this Agreement is void or voidable.**

**(Employee's Initials Acknowledging Arbitrator's Exclusive Authority)**

- 2.7 Arbitration Decision. The arbitrator's decision will be final and binding. The arbitrator shall issue a written arbitration decision revealing the essential findings and conclusions upon which the decision and/or award is based within thirty (30) calendar days after the hearing's completion. A party's right to appeal the decision is limited to grounds provided under applicable federal or state law.
  - 2.8 Place of Arbitration. The arbitration shall take place at a mutually convenient location (preference shall be provided to a JAMS office) that must be within fifty (50) miles of Employee's last known address with Employer. If the parties cannot agree upon a location, or if a JAMS office is not within fifty (50) miles of Employee's last known address with Employer, then the arbitration shall be held at the JAMS office closest to the last Employer worksite with which Employee most regularly communicated. If Employee worked remotely, then the arbitration shall be held at the JAMS office closest to Employer's worksite where Employee was "assigned," even though Employee did not physically work at the worksite.
- 3. Application for Emergency Injunctive and/or Other Equitable Relief. Claims by Employer or Employee for emergency injunctive and/or other equitable relief relating to unfair competition and/or the use and/or unauthorized disclosure of trade secrets or confidential information shall be submitted to JAMS for emergency treatment. The parties agree that the JAMS administrator may select a neutral hearing officer (subject to conflicts) to hear the emergency request only. The hearing officer should be experienced in considering requests for emergency injunctive and/or other equitable relief. The hearing officer shall conform his/her consideration and ruling with the applicable legal standards as if this matter were heard in a court of law in the applicable jurisdiction for such a dispute.
  - 4. Severability. Should any portion of this Agreement be found unenforceable, such portion will be severed from this Agreement, and the remaining portions shall continue to be enforceable.
  - 5. Effective Date. This Agreement is retroactively effective to the date that Employee's employment with Employer initially began. This Agreement to arbitrate shall survive the termination of Employee's employment.
  - 6. Construction. This Agreement shall be construed and enforced pursuant to the FAA. The Arbitrator, and not any federal, state, or local court or agency, shall have the exclusive

authority to resolve any dispute relating to the interpretation, applicability, enforceability, or formation of this Agreement, including, but not limited to, any claim that all or any part of this Agreement is void or voidable. Any disputes regarding the enforceability or validity of this Agreement or any of its provisions shall be resolved as if the arbitrator or other decision-maker, if any, is acting as a federal district court judge applying the FAA and its precedent.

\_\_\_\_\_(Employee’s Initials Acknowledging the FAA)

- 7. Consideration. For employees who are currently employed, Employer’s offer to make Employee eligible for promotions, raises, bonuses, gifts and prizes in the future, and the promises by Employer and Employee to arbitrate differences, rather than litigate them before courts or other bodies, provide consideration for each other to enter into this Agreement. For newly hired employees, Employer and Employee agree that in addition to the above consideration, Employer’s offer of employment (at-will or otherwise) provides adequate consideration for each other to enter into this Agreement.
- 8. Signatures. A facsimile, scanned, copy, digital, or photographic signature shall have the same force and effect as an original signature.
- 9. Representation, Fees, and Costs. Each party may be represented by an attorney or other representative selected by the party. Each party shall be responsible for its own attorneys’ or representative’s fees. However, if any party prevails on a statutory claim that affords the prevailing party’s attorneys’ fees, or if there is a written agreement providing for fees, the arbitrator may award reasonable fees to the prevailing party subject to written evidence of such fees and applicable law. Employer shall be responsible for the arbitrator’s fees and costs to the extent they exceed any fee or cost that Employee would be required to bear if the action were brought in court.
- 10. **Waiver of Jury Trial/Exclusive Remedy. EMPLOYEE AND EMPLOYER KNOWINGLY WAIVE ANY CONSTITUTIONAL RIGHT TO HAVE ANY DISPUTE BETWEEN THEM DECIDED BY A COURT OF LAW AND/OR BY A JURY IN COURT.**

\_\_\_\_\_(Employee’s Initials Acknowledging Waiver of Jury Trial)

- 11. **Waiver of Representative/Class Action Proceedings. TO THE FULLEST EXTENT PERMITTED BY LAW, EMPLOYEE AND EMPLOYER KNOWINGLY AGREE TO BRING ANY CLAIMS GOVERNED BY THIS AGREEMENT IN HIS/HER/ITS INDIVIDUAL CAPACITY AND NOT AS A PLAINTIFF, CLASS MEMBER OR REPRESENTATIVE IN ANY PURPORTED CLASS OR REPRESENTATIVE ACTION. THEY FURTHER AGREE TO WAIVE ANY RIGHT TO PARTICIPATE IN ANY REPRESENTATIVE OR CLASS ACTION PROCEEDING RELATED TO ANY CLAIMS GOVERNED BY THIS AGREEMENT. EMPLOYER AND EMPLOYEE ALSO AGREE THAT THE ARBITRATOR MAY NOT CONSOLIDATE MORE THAN ONE INDIVIDUAL’S CLAIMS, AND MAY NOT OTHERWISE PRESIDE OVER ANY FORM OF REPRESENTATIVE OR CLASS ACTION PROCEEDING, INCLUDING, BUT NOT LIMITED TO, ANY REPRESENTATIVE ACTION UNDER CALIFORNIA BUSINESS AND PROFESSIONS CODE SECTIONS 17200 ET SEQ. THIS SECTION DOES NOT APPLY TO ANY REPRESENTATIVE ACTIONS BROUGHT UNDER PAGA, AS ADDRESSED IN SECTION 1.3 ABOVE.**

\_\_\_\_\_(Employee’s Initials Acknowledging Waiver of Representative/Class Action)

- 12. Sole and Entire Agreement. This Agreement expresses the entire Agreement of the parties and shall supersede any and all other agreements, oral or written, concerning arbitration. This Agreement is not, and shall not be construed to create, any contract of employment,

express or implied.

- 13. Acknowledgment. Employee acknowledges that Employee has carefully read this Agreement, understands its terms, and agrees that all understandings and agreements between Employer and Employee relating to the subjects covered in the Agreement are contained in it. Employee has knowingly entered into the Agreement without reliance on any provisions or representations by Employer, other than those contained in this Agreement. Employee further acknowledges that Employee has been given the opportunity to discuss this Agreement with Employee’s private legal counsel and Employee has utilized that opportunity to the extent desired.

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

\_\_\_\_\_  
 Employee Printed Name

**On behalf of California Pacific Charter Schools**

Dated: \_\_\_\_\_  
 \_\_\_\_\_  
 Employer’s Signature

\_\_\_\_\_  
 Employer Representative’s Printed Name & Title

4865-7905-2637, v. 5

# Coversheet

## Consent - Policy Development

**Section:** X. Consent  
**Item:** D. Consent - Policy Development  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** BUS Policy Revisions 8.8.23.pdf  
CPCS - 4150 Mileage Reimbursement Policy-Final.pdf  
CPCS - 4150 Mileage Reimbursement Policy - Redline.pdf  
CPCS - 6040 Local Assessment Policy .pdf  
CPCS - 6040 Local Assessment Policy\_redline\_8.8.2023.pdf

**CALIFORNIA PACIFIC CHARTER SCHOOLS**

**Agenda Item:**

**Date:** August 8, 2023

	Correspondence/Proposals/Reports
X	Consent Agenda
	Business/Financial Services
	Education/Student Services
	Personnel Services
	Curriculum
X	Policy Development

**Item Requires Board Action:** X

**Item is for Information Only:** \_\_\_\_\_

**Item:** Approval of existing board policies reviewed and revised by staff for the 2023-2024 School Year.

**Background:**

In order to ensure adherence with State and Federal laws related to business and non-instructional services, it is recommended the Board approve the following policy as presented.

**REVISED**

The following are current policies that have been revised to provide clarity or alignment with changes in law or procedures.

***4000 Series - Personnel Services***

4150 - CPCS Mileage Reimbursement Policy

- This policy is revised to align with CalPac procedures and remove inapplicable language intended for reimbursement to teachers for in-person student meetings.

***6000 Series - Instruction***

6040 - CPCS Local Assessment Policy

- This policy has been revised to reflect the replacement of NWEA as CalPac’s local assessment to the newly approved Renaissance STAR assessment. It was also updated to reflect the subtests, targets, testing windows and proctoring requirements that went along with the implementation of the new local assessment.



It is recommended the Board approve the revised board policies for the 2023-2024 school year.

**Fiscal Impact:** None.

## PERSONNEL SERVICES

4150-CPCS

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### MILEAGE REIMBURSEMENT POLICY

It is the policy of California Pacific Charter Schools (“CPCS” or the “School”) to provide employees with reimbursements for work related use of their personal vehicles.

Employees may be required to drive their personal vehicles for work related purposes (e.g., while visiting independent study students or to participate in staff meetings). To compensate eligible employees for the costs associated with such travel, the School shall provide such employees with a mileage reimbursement in alignment with the IRS approved rate, which represents the total amount owed to the employee for vehicle expenses. The mileage reimbursement shall not constitute payment or reimbursement for any other travel related expenses.

All employees are eligible for mileage reimbursement when required to drive for the purpose of conducting business on behalf of the School. Employees must submit a mileage reimbursement form to their supervisor within 30 days of traveling. Employees must include verification of miles driven either using a platform adopted by the School, or by attaching a Mapquest/Google map or the like, with the request for reimbursement form.

When appropriate, the School may determine to provide eligible employees with a comparable mileage stipend per month in lieu of a per mile reimbursement rate. Stipends must be paid in conjunction with regular pay periods and must be prorated for months in which the employee was not in regular work status for the entire month. The employee shall report to the School within 14 days of any month in which their actual vehicle expenses exceed the allowance.

**PERSONNEL SERVICES****4150-CPCS****MILEAGE REIMBURSEMENT POLICY**

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~~Employees will be reimbursed for mileage starting after the first 30 miles driven or beginning with the first trip between the first and second work site locations, whichever comes first. The mileage allowance is based on travel between designated work sites and measures the distance from the first work site location to each subsequent location, ending with the last location visited by the employee. For example, for a teacher traveling between student appointments, mileage is based on the distance from meeting location 1 to meeting location 2, meeting location 2 to meeting location 3, and so on, until the employee arrives at the final student meeting. The employee’s travel to the first work site location and from the final work site location is not covered by the mileage allowance unless it exceeds 30 miles, nor is it a reimbursable expense, as it is considered normal commuting time.~~

When appropriate, the School may determine to provide eligible employees with a comparable mileage stipend per month in lieu of a per mile reimbursement rate. Stipends must be paid in conjunction with regular pay periods and must be prorated for months in which the employee was not in regular work status for the entire month. The employee shall report to the School within 14 days of any month in which their actual vehicle expenses exceed the allowance.

**INSTRUCTION****6040-CPCS**

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**LOCAL ASSESSMENT POLICY**

California Pacific Charter Schools operates California Pacific Charter – Los Angeles, California Pacific Charter – San Diego, and California Pacific Charter - Sonoma (hereinafter, collectively “CPCS” or the “School”).

Charter schools exist in a performance based accountability system for student academic performance, and CPCS fully participates in that system. A charter school cannot continue to exist without collecting data on student performance from a variety of assessments and indicators.

One of the responsibilities of CPCS is to increase student academic achievement. When a charter authorizer is evaluating whether to grant a school’s charter renewal petition, “increases in pupil academic achievement” is the most important factor in the decision. (Ed. Code, §§ 47607(c)(2) , 47607(a)(3)(A).) Consequently, CPCS primarily collects academic performance data through state mandated testing in addition to administering local assessments.

To meet this responsibility, CPCS hereby implements this local assessment policy outlining the local assessment process and participation requirements for all enrolled students.

**Local Assessments**Overview

CPCS uses Renaissance STAR as its State Board of Education (SBE) approved local assessment. This assessment targets student academic performance in math and reading for screening, progress monitoring, and instructional planning.. It is a web-based computer adaptive assessment platform that adjusts to individual student performance and helps assess true levels of ability. Each assessment test pinpoints a student’s needs down to the sub-skill and standard domain level in math and English language arts.

Purpose

The purpose of local assessments is to help school staff identify each student’s educational performance, growth, and areas needing improvement in order to enhance teaching and learning and communicate student academic performance levels to students and parents/guardians. Local assessments are one measure of student performance that provide a thorough evaluation and therefore, an extensive scope of the student’s learning and mastery of grade level standards.

**INSTRUCTION****6040-CPCS**

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**LOCAL ASSESSMENT POLICY**

CPCS uses the Renaissance STAR assessments to gather beginning of year baseline data and end of year growth data on student performance levels in math and English Language Arts in order to measure student mastery of state grade level standards. Ongoing progress monitoring using these assessments shows whether students are on track to achieve end-of-year learning targets of making at least one year of student growth, including projected performance on CAASPP state assessments. The results from Renaissance STAR provide common core based data necessary for meeting state and Charter School academic achievement monitoring and renewal requirements.

**Grade Levels Required to Test**

Students in grades 2-11 are required to complete the Renaissance STAR assessments at the beginning and end of each school year. Additional assessment administrations may be given to support academic intervention initiatives as a measure of student growth and progress.

While not required, it is a CPCS best practice to assess school readiness and identify academic needs for TK-1st grade students by administering local fluency and math sense assessments. TK-1st grade students will be assessed in English Language Arts on their letters/sounds and word recognition, and in math on number sense and other general math concepts. The results from these assessments provide data on student readiness for kindergarten and first grade concepts to show where additional support may be needed to build skills in these lower grades prior to high stakes state testing.

**No Opt Out for Local Assessments**

Per California Ed. Code, parents/guardians may opt out of state mandated academic testing by submitting a written request to the school each year. CPCS does NOT recommend opting out of state testing due to the accountability requirements from the state.

However, parents/guardians may NOT opt their child out of school local assessments. The choice to opt out ONLY applies to the state mandated assessments, as there is no Ed. Code permitting a parent/guardian to opt out of the school's local assessments

**Local Assessment Schedule**

Students will complete local assessments during the school's local assessment testing windows in the subjects of math and reading. All local assessments must be proctored by a CPCS staff

**INSTRUCTION****6040-CPCS**

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**LOCAL ASSESSMENT POLICY**

member via Zoom or other prescribed virtual secure testing delivery system, and following all virtual proctoring procedures outlined in the school's Virtual Proctoring Policy. The teacher of record is responsible for following up on student completion of all local assessments.

All assessment content areas must be completed within the assigned testing window. Assessment content areas will be broken up within the testing window to allow adequate time to complete each subject area assessment. Students should attempt to complete a singular content area assessment within one sitting, however, students may save and resume an assessment on another day/time so long as proctoring guidelines are met and the test is resumed and completed within the assessment system's allowed paused test time frame.

Testing windows are set to provide students with a sufficient number of instructional days to accurately measure student growth and progress between assessments. Testing windows for required assessments occur during the start of the school year (fall) and end of the school year (spring) at school defined date ranges. Students will be provided with a daily testing schedule to complete each subject area within the specified testing window. Student enrollment start dates may impact assessment participation requirements and testing schedule within a testing window.

**Late Enrollment Students**

Students with enrollment start dates occurring after the first day of the school year through the California Basic Educational Data System (CBEDS) reporting date, are required to complete the initial local assessments within the initial start of year testing window. These students will be counted towards the school's local assessment participation rate and verifiable data results.

Students with an enrollment start date later than the California Basic Educational Data System (CBEDS) reporting date will not be required to complete an initial start of year local assessment and will not be counted as part of the school-reported assessment participation rates or results. These students may be given the initial assessment for informational purposes only to support student academic success.

Students with an enrollment start date later than the California Basic Educational Data System (CBEDS) reporting date will be required to complete end of year local assessments during the end of year testing window so long as their enrollment start date occurs prior to March 1st. Students with an enrollment start date of March 1st or later will not be required to participate in end of year local assessment testing and will not be counted in the school's verifiable data

## INSTRUCTION

6040-CPCS

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### LOCAL ASSESSMENT POLICY

results. The teacher of record is responsible for scheduling, tracking completion, and administering all assessments for late enrollment students.

#### **Remote Administration Process of Local Assessments**

CPCS follows its Virtual Proctoring Policy and Academic Integrity Policy to administer local assessments. Virtual proctoring procedures meet all recommended proctoring requirements from the school's local assessment publisher to produce verified data. All local assessments must be proctored by a CPCS teacher or other qualified staff member. Students must follow all virtual proctoring requirements, including being on webcam in Zoom or other prescribed virtual secure testing delivery system using their school provided computer to participate in proctoring. Personal devices, outside proctors, and assistance from non CPCS staff on the assessment are prohibited.

#### **Local Assessment Results Reporting**

Local Assessment results are uploaded to the Student Information System at the end of the testing administration window. Students and parents/guardians may access result reports at any time through the student and parent portals of the Student Information System. The school may hold, and a parent/guardian may request, an assessment results review meeting with their child's teacher for more information on what scores and results mean.

Local Assessment results are used by CPCS staff to monitor student growth and academic achievement. Student scores do not impact student course grades. However, results may be used to determine course placement in math and English language arts classes, and drive academic support programs, including qualifying students for tiered intervention support classes and summer school. A parent/guardian conference with the child's teacher and the school's intervention teacher may be scheduled to address additional support for identified students performing below grade level based on local assessment scores. Parents/guardians will have an opportunity to and are encouraged to ask any questions they have regarding assessment results during this meeting time.

#### **Consequences for Not Completing the Local Assessments**

Completion of CPCS's local assessments are a mandatory requirement of student enrollment. There is no "Opt-Out" option for local assessments.

**INSTRUCTION****6040-CPCS**

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**LOCAL ASSESSMENT POLICY**

The following consequences apply to students who do not complete their local assessments within the designated testing window:

1. **First Warning:** If the student has any incomplete assessments after day three of the testing schedule, the student and parent/guardian will receive an official warning that local assessments are incomplete and the requirements on how to attend make-up proctoring sessions. The student will have ten (10) school days from the date of this warning to complete all outstanding assessments.
2. **Second Warning and Parent Conference:** If, after the ten (10) school days from the date of the official warning have passed and the local assessments are still not complete, the teacher will arrange a mandatory parent/guardian conference to be held within three (3) school days to discuss barriers to completing the local assessment. At this meeting, a plan will be created to ensure completion of the local assessments within five (5) school days of this meeting.
3. **Third Warning and Placement on Academic Probation:** If, after the five (5) school days have passed and the local assessments are still not complete, the student will be placed on academic probation and the parent/guardian must attend an academic probation meeting with the designated administrator. The student will be given five (5) school days from the date of this meeting to complete the proctored assessments with their teacher. The student will remain on academic probation until the assessment is completed and may be subject to additional academic probation requirements and consequences.

Students with an enrollment start date after the first day of the school year may have a shortened period of days to correct incomplete assessments to ensure they complete their local assessments within the designated testing window.

**Students with Special Education and 504 Plans**

Students with an Individual Education Program (IEP) or a 504 Plan (504) will receive testing accommodations and/or supports when taking local assessments as outlined in the student's IEP or 504. An IEP or 504 Plan does not exempt a student from the mandatory requirements to complete local assessments.



**INSTRUCTION****6040-CPCS**

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**LOCAL ASSESSMENT POLICY**

California Pacific Charter Schools operates California Pacific Charter – Los Angeles, California Pacific Charter – San Diego, and California Pacific Charter - Sonoma (hereinafter, collectively “CPCS” or the “School”).

Charter schools exist in a performance based accountability system for student academic performance, and CPCS fully participates in that system. A charter school cannot continue to exist without collecting data on student performance from a variety of assessments and indicators.

One of the responsibilities of CPCS is to increase student academic achievement. When a charter authorizer is evaluating whether to grant a school’s charter renewal petition, “increases in pupil academic achievement” is the most important factor in the decision. (Ed. Code, §§ 47607(c)(2) , 47607(a)(3)(A).) Consequently, CPCS primarily collects academic performance data through state mandated testing in addition to administering local assessments.

To meet this responsibility, CPCS hereby implements this local assessment policy outlining the local assessment process and participation requirements for all enrolled students.

**Local Assessments**Overview

CPCS uses ~~Renaissance STAR~~ ~~Northwest Evaluation Association Measures of Academic Performance (NWEA MAP)~~ as its ~~local~~ ~~State Borad of Education (SBE)~~ ~~state~~ approved local assessment. This assessment targets student academic performance in math ~~and reading for screening, progress monitoring, and instructional planning,~~ ~~reading, and language arts.~~ It is a web-based ~~computer adaptive~~ ~~adapative~~ assessment platform that ~~adjusts~~ ~~adapts~~ to individual student performance and helps assess true levels of ability. Each assessment- test pinpoints a student’s needs down to the sub-skill and standard domain level ~~in math and English language arts.~~

Purpose

The purpose of local assessments is to help ~~students, parents/guardians, and~~ school staff identify each student’s educational performance, growth, and areas needing improvement in order to

**INSTRUCTION****6040-CPCS****LOCAL ASSESSMENT POLICY**

enhance teaching and learning and communicate student academic performance levels to students and parents/guardians. Local assessments are one measure of student performance that provides a thorough evaluation and therefore, an extensive scope of the student's learning and mastery of grade level standards.

CPCS uses the Renaissance ~~STAR~~NWEA MAP Growth assessments to gather beginning of year baseline data and end of year growth data on student performance levels in math and English Language Arts in order to measure student mastery of state grade level standards. Ongoing progress monitoring using these assessments shows whether students are on track to achieve end-of-year learning targets of making at least one of year of student growth, including meeting projected performance on CAASPP state assessments. The results from Renaissance ~~STAR~~NWEA MAP provide common core based data necessary for meeting state and Charter School academic achievement monitoring and renewal requirements.

Grade Levels Required to Test

Students in grades 2-11 are required to complete the Renaissance ~~STAR~~NWEA MAP Growth assessments at the beginning and end of each school year. Additional assessment administrations may be given to support academic intervention initiatives as a measure of student growth and progress.

While not required, it is a CPCS best practice to assess school readiness and identify academic needs for TK-1st grade students by administering local fluency and math sense assessments. TK-1st grade students will be assessed in English Language Arts on their letters/sounds and word recognition, and in math on number sense, and other general math concepts. The results from these assessments provide data on student readiness for kindergarten and first grade concepts to and show where additional support may be needed to build skills in these lower grades prior to high stakes state testing.

**No Opt Out for Local Assessments**

Per California Ed. Code, parents/guardians may opt out of state mandated academic testing by submitting a written request to the school each year. CPCS does NOT recommend opting out of state testing due to the accountability requirements from the state.

**INSTRUCTION****6040-CPCS**

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**LOCAL ASSESSMENT POLICY**

However, parents/guardians may NOT opt their child out of school local assessments. The choice to opt out ONLY applies to the state mandated assessments, as there is no Ed. Code permitting a parent/guardian to opt out of the school's local assessments

**Local Assessment Schedule**

Students will complete local assessments during the school's local assessment testing windows in the subjects of math, ~~language arts,~~ and reading. All local assessments must be proctored by a CPCS staff member **via Zoom or other prescribed virtual secure testing delivery system,** ~~using the prescribed secure testing browsers~~ and following all virtual proctoring procedures outlined in the school's Virtual Proctoring Policy. The teacher of record is responsible for following up on student completion of all local assessments.

All assessment **content areas** ~~subjects~~ must be completed within the assigned testing window. Assessment **content subject** areas will be broken up **withi**~~over~~ the testing window to allow adequate time to complete each subject area assessment. Students should attempt to complete **a singular content** ~~the entire subject~~ area assessment within one sitting, however, students may save and resume an assessment on another day/time so long as proctoring guidelines are met **and the test is resumed and completed within the assessment system's allowed paused test time frame.**

Testing windows are set to provide students with a sufficient number of instructional days to accurately measure student growth and progress between assessments. Testing windows for required assessments occur during the start of the school year (fall, ~~quarter 1~~) and end of the school year (spring, ~~quarter 4~~) at school defined date ranges. Students will be provided with a daily testing schedule to complete each subject area within the specified testing window. Student enrollment start dates may impact assessment participation requirements and testing schedule within a testing window.

Late Enrollment Students

Students with enrollment start dates occurring after the first day of the school year through the California Basic Educational Data System (CBEDS) reporting date, are required to complete the initial local assessments within the initial **start of year** testing window. These students will be counted towards the school's local assessment participation rate and **verifiable** ~~verified~~-data results.

**INSTRUCTION****6040-CPCS**

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**LOCAL ASSESSMENT POLICY**

Students with an enrollment start date later than the California Basic Educational Data System (CBEDS) reporting date will not be required to complete an initial **start of year** local assessment and will not be counted as part of the school-reported assessment participation rates or results. These students may be given the initial assessment for informational purposes only to support student academic success.

Students with an enrollment start date later than the California Basic Educational Data System (CBEDS) reporting date will be required to complete end of year local assessments during the end of year testing window so long as their enrollment start date occurs prior to ~~March~~ ~~May~~ 1st. Students with an enrollment start date of ~~March~~ ~~May~~ 1st or later will not **be required to participate in end of year local assessment testing and will not be counted in the school's verifiable data results.** The teacher of record is responsible for scheduling, tracking completion, and administering ~~all initial~~ assessments for late enrollment students.

**Remote Administration Process of Local Assessments**

CPCS follows its Virtual Proctoring Policy **and Academic Integrity Policy** to administer local assessments. Virtual proctoring procedures meet all recommended proctoring requirements from the school's local assessment publisher to produce verified data. All local assessments must be proctored by a CPCS teacher or other qualified staff member. Students must **follow all virtual proctoring requirements, including being on webcam in Zoom or other prescribed virtual secure testing delivery system using** ~~use the secure browser on~~ their school provided computer to participate in proctoring. Personal devices, ~~and~~ outside proctors, **and assistance from non CPCS staff on the assessment** are prohibited.

**Local Assessment Results Reporting**

Local Assessment results are uploaded to the Student Information System at the end of the testing administration window. Students and parents/guardians may access result reports at any time through the student and parent portals of the Student Information System. **The school may hold and a** parent/guardian may request an assessment results review meeting with their child's teacher for more information on what scores and results mean.

Local Assessment results are used by CPCS staff to monitor student growth and academic achievement. Student scores do not impact student course grades. However, results ~~may be are~~ used to determine course placement in math and English language arts classes, and drive

**INSTRUCTION****6040-CPCS**

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**LOCAL ASSESSMENT POLICY**

academic support programs, including qualifying students for tiered intervention support classes **and summer school**. A parent/guardian conference with the child's teacher and the school's intervention teacher may be scheduled to address additional **support** for identified students performing below grade level based on local assessment scores. Parents/guardians will have an opportunity to and are encouraged to ask any questions they have regarding assessment results during this meeting time.

**Consequences for Not Completing the Local Assessments**

Completion of CPCS's local assessments are a mandatory requirement of student enrollment. There is no "Opt-Out" option for local assessments.

The following consequences apply to students who do not complete their local assessments within the designated testing window:

1. **First Warning:** If the student has any incomplete assessments after day three of the testing schedule, the student and parent/guardian will receive an official warning that local assessments are incomplete and the requirements on how to attend make-up proctoring sessions. The student will have ten (10) school days from the date of this warning to complete all outstanding assessments.
2. **Second Warning and Parent Conference:** If, after the ten (10) school days from the date of the official warning have passed and the local assessments are still not complete, the teacher will arrange a mandatory parent/guardian conference to be held within three (3) school days to discuss barriers to completing the local assessment. At this meeting, a plan will be created to ensure completion of the local assessments within five (5) school days of this meeting.
3. **Third Warning and Placement on Academic Probation:** If, after the five (5) school days have passed and the local assessments are still not complete, the student will be placed on academic probation and the parent/guardian must attend an academic probation meeting with the designated administrator. The student will be given five (5) school days from the date of this meeting to complete the proctored assessments with their teacher. **The student will remain on academic probation until the assessment is completed and may be subject to additional the school's other academic probation requirements and consequences.**

Students with an enrollment start date after the first day of the school year may have a shortened period of days to correct incomplete assessments to ensure they complete their local assessments within the designated testing window.

## INSTRUCTION

6040-CPCS

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### LOCAL ASSESSMENT POLICY

#### Students with Special Education and 504 Plans

Students with an Individual Education Program Plan (IEP) or a 504 Plan (504) will receive testing accommodations and/or supports when taking local assessments as outlined in the student's IEP or 504. An IEP or 504 Plan does not exempt a student from the mandatory requirements to complete local assessments.

# Coversheet

## Approval of Funds for Purchase of Student and Faculty Technology

**Section:** XI. Business/Financial Services  
**Item:** A. Approval of Funds for Purchase of Student and Faculty Technology  
**Purpose:** Vote  
**Submitted by:** Christine Feher  
**Related Material:** Lenovo\_CB\_Quote.pdf  
Asset\_Tag\_Accesories\_Quote.pdf  
Staff\_Dell\_Quote.pdf  
Monitor\_Quote.pdf

### BACKGROUND:

CalPac requests to purchase Chromebooks to ensure enough inventory to meet all students' demands. Students are required to use a school-issued laptop with the appropriate secure browser technology properly installed on each device.

Staples Quote 827353 shows an example of the computers that will be purchased for student use.

Asset Tag Accessories Quote is an example of the asset tags necessary to help identify our devices and ensure they are returned.

CalPac requests funds to purchase devices, docking stations, and monitors to ensure that staff can perform their duties and have enough inventory to meet the demand of any new staff or replacements needed.

Staples Quote 835560 shows an example of a staff computer that will be purchased for new staff members or as a replacement for staff computers that are no longer in service.

Amazon cart with Dell monitors shows an example of the monitors that will be purchased for the use of staff to be able to perform their duties.

### RECOMMENDATION:

It is recommended the Board approve the funds for the purchase of student and faculty technology for California Pacific Charter Schools - Sonoma (#2037), San Diego (#1758), and Los Angeles (#1751) for the 2023-24 school year.



**Quotation (Open)**

Quote # : 827353 2 rev of 2  
 Modified Date: May 01, 2023 02:32 PM EDT  
 Expiration Date: 05/26/2023  
 Description: Request#827353

Sequoia (non-CNET account)

**Staples Technology Solutions**

P O Box 95230  
 Chicago, Illinois 60694-5230  
 United States  
 (P) 1-888-438-4806

**BILLING**

California Pacific Charter Schools  
 Morfin, Alexis  
 940 South Coast Drive  
 Suite #18  
 Costa Mesa, CA 92626  
 United States  
 (P) 855-225-7227  
 amorfin@cal-pacs.org

**SHIPPING**

California Pacific Charter Schools  
 Nogueda, Victor  
 940 South Coast Drive  
 Suite #185  
 Costa Mesa, CA 92626  
 United States  
 (P) 707-394-4343  
 (F) 888-769-1750  
 vnogueda@cal-pacs.org

**Payment Method**



Terms: Net 30 Days

**Shipping Info**

Delivery Method: UPS Ground  
 Carrier Account #:  
 Special Instructions:

**We appreciate your business!** All orders will be processed on the day of submission. Please allow up to 7 business days for delivery. Please contact us should you have any questions.

**Products**

#	Image	Description	Part #	Qty	Unit Price	Total
1		<b>Lenovo 500e Chromebook (2nd Gen) 81MC</b> Flip design - Intel Celeron N4120 / 1.1 GHz - Chrome OS - UHD Graphics 600 - 4 GB RAM - 32 GB eMMC - 11.6" IPS touchscreen 1366 x 768 (HD) - Wi-Fi 5 - black - kbd: English	81MC005AUS	200	\$226.23	\$45,246.00
2		<b>Google Chrome OS Management Console</b> License - academic	CROS-SW-DIS- EDU-NEW	200	\$32.00	\$6,400.00

**Subtotal: \$51,646.00**  
 Tax (7.7500%): \$4,002.57  
 Fees: \$0.00  
**Total: \$55,648.57**

**Special Note:** Displayed inventory availability is subject to change. Based upon pandemic driven shortages and frequent pricing changes, prompt placement of your order, will help establish prioritization and provide the highest likelihood of fulfillment for constrained products.

**Terms of Purchase**

If shipping charges or sales tax & fees are shown, they are estimates only. Actual shipping charges and sales taxes and fees will be calculated at the time of shipment and added to the invoice. Pricing quoted is subject to change prior to shipment, manufacturer and distributor pricing changes regularly. This quote is confidential and meant for the client recipient above, any unauthorized review, use, disclosure or distribution is prohibited. Credit cards may be used only at the time of purchase and not for the payment of invoices. Credit Card Fees may apply.

Purchase subject to Terms and Conditions here : [https://sts.staples.com/tech\\_services\\_STS.html](https://sts.staples.com/tech_services_STS.html)

Returns are subject to Return Policy found here: <https://sts.staples.com/returns.html>.

Leasing available on orders over \$1,000 and is subject to credit approval and agreement to terms.





Victor Noguera <vnoguera@cal-pacs.org>

### Saved Quote CM231-000-076 from MaverickLabel.com

3 messages

Chris Ford <CFord@mavericklabel.com>  
Reply-To: Chris Ford <CFord@mavericklabel.com>  
To: vnoguera@cal-pacs.org, CFord@mavericklabel.com

Mon, Apr 10, 2023 at 2:04 PM



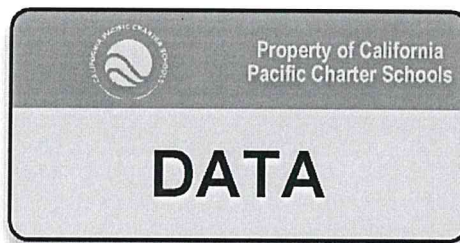
Hello from Chris Ford -

I have saved quote **CM231-000-076** for you.

[Place an Order](#)

This quote expires in 14 days.

- Size:** 2.0 in x 1.0 in
- Substrate:** Polyester-2 mil-Metalized Matte Silver
- Numbering:** Database Merge
- Barcode:** Number Only
- Serial Numbering:** Database Merge
- Color:** Process/Lagoon Blue, Black
- Line #1:** Property of California
- Line #2:** Pacific Charter Schools



Quantity	Price	Production Time*
100	\$153.49	2 days
250	\$238.00	2 days
500	\$378.85	2 days

\* Does not include any proofing time

Please Note: material shortages may impact production time. If you have a time-sensitive order, please chat with our CustomerCare team to discuss options.

**Quotation (Open)**

 Quote # : 835560 1 rev of 1  
 Modified Date: May 02, 2023 08:30 AM EDT  
 Expiration Date: 05/04/2023  
 Description: Request#9988110

Sequoia (non-CNET account)

**Staples Technology Solutions**

 P O Box 95230  
 Chicago, Illinois 60694-5230  
 United States  
 (P) 1-888-438-4806

**BILLING**

 California Pacific Charter Schools  
 Morfin, Alexis  
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 Costa Mesa, CA 92626  
 United States  
 (P) 707-394-4343  
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 United States  
 (P) 707-394-4343  
 (F) 888-769-1750  
 vnogueda@cal-pacs.org

**Payment Method**

Terms: Net 30 Days

**Shipping Info**

 Delivery Method: FedEx Ground  
 Carrier Account #:  
 Special Instructions:

**We appreciate your business!** All orders will be processed on the day of submission. Please allow up to 7 business days for delivery. Please contact us should you have any questions.

**Products**

#	Image	Description	Part #	Qty	Unit Price	Total
1		Inspiron 16 2-in-1 (7620) i7/16GB/512GB/W11H	210-BDFG	10	\$931.36	\$9,313.60

Note: Estimated delivery if purchased today: May. 05, 2023  
 12th Generation Intel Core i7-1260P Processor (18MB Cache, up to 4.7GHz)  
 Windows 11 Home, English  
 Intel(R) Iris(R) Xe Graphics  
 16GB, 2x8GB, DDR4, 3200MHz  
 512GB M.2 PCIe NVMe Solid State Drive  
 16.0-inch 16:10 FHD+ (1920 x 1200) Touch 300nits WVA Display with ComfortView Plus Support  
 Platinum Silver  
 Titan Gray Backlit,FPR Kybd, English  
 Intel(R) Wi-Fi 6E AX211, 2x2, 802.11ax, Bluetooth(R) wireless card  
 6-Cell Battery, 87Whr (Integrated)  
 65W Type-C EPEAT Adapter  
 Wireless Driver for AX211, Athena  
 US Power Cord  
 Documentation, English/French w/ QR Code  
 Energy Star Label  
 System Driver for Windows  
 Retail Print On Demand Label  
 Shipping Material  
 Fixed Hardware Configuration  
 English Palmrest Label  
 Intel(R) Core(TM) i7 EVO non-vPro Processor Label  
 Regulatory Label  
 Dell Cinema Color  
 Amazon Alexa App  
 Dell Limited Hardware Warranty Initial Year  
 Onsite/In-Home Service After Remote Diagnosis, 1 Year  
 No Microsoft Office License Included

**Subtotal: \$9,313.60**  
 Tax (7.7500%): \$721.80  
 Fees: \$0.00  
**Total: \$10,035.40**

**Special Note:** Displayed inventory availability is subject to change. Based upon pandemic driven shortages and frequent pricing changes, prompt placement of your order, will help establish prioritization and provide the highest likelihood of fulfillment for constrained products.

**Terms of Purchase**

If shipping charges or sales tax & fees are shown, they are estimates only. Actual shipping charges and sales taxes and fees will be calculated at the time of shipment and added to the invoice. Pricing quoted is subject to change prior to shipment, manufacturer and distributor pricing changes regularly. This quote is confidential and meant for the client recipient above, any unauthorized review, use, disclosure or distribution is prohibited. Credit cards may be used only at the time of purchase and not for the payment of invoices. Credit Card Fees may apply.

Purchase subject to Terms and Conditions here : [https://sts.staples.com/tech\\_services\\_STS.html](https://sts.staples.com/tech_services_STS.html)

Returns are subject to Return Policy found here: <https://sts.staples.com/returns.html>.

Leasing available on orders over \$1,000 and is subject to credit approval and agreement to terms  
 Powered by BoardOnTrack



All ▾ Enter keyword or product number

Shop breakroom supplies ▶

All Add People Buy Again Gift Cards Recommendations

EN

Hello, Alexis

Account for CalPac Online

Lists

Business Prime

20



**Alexis, don't forget to check out with Pay by Invoice.**  
The purchasing line that lets you buy now and pay later.

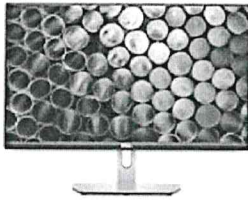
## Shopping Cart

Subtotal (20 items): **\$2,799.80**

This order contains a gift

Price

Proceed to checkout



**Dell S2421H 24-Inch 1080p Full HD 1920 x 1080 Resolution 75Hz USB-C Monitor,**

**\$139.99**

In Stock

& FREE Returns

This is a gift Learn more

Size: 24.0" FHD

Display Type: Fixed

Part Number: S2421H

20

Delete

Save for later

Compare with similar items

Share

Subtotal (20 items): **\$2,799.80**

### Quantity Discounts to consider

Logitech MK545  
Advanced Wireless...  
9,410  
\$54.99

Add to Cart

MUNBYN Thermal  
Direct Shipping Label...  
9,859  
\$21.95

Add to Cart

HumanCentric Mount  
Compatible with Dell...  
394  
\$34.98

Add to Cart

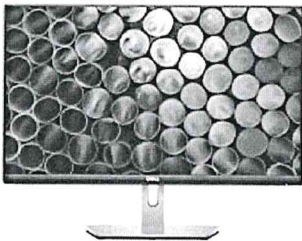
Logitech MK335  
Wireless Keyboard an...  
7,275  
\$34.99

Add to Cart

## Your Items

Saved for later (16 items)

Buy it again



**Dell S2421H 24-Inch 1080p Full HD 1920 x 1080 Resol...**

**\$139.99**

In Stock

& FREE Returns

Size: 24.0" FHD

Display Type: Fixed

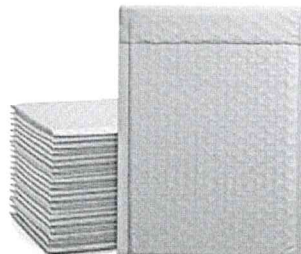
Part Number: S2421H

Move to cart

Delete

Add to list

Compare with similar items



**Metronic Bubble Mailers 6x10 Inch 50 Pack, Cushioning Shi...**

**\$16.99**

In Stock

& FREE Returns

Color: Aqua

Size: 6x9"

Move to cart

Delete

Add to list

Compare with similar items

# Coversheet

## Approval of PresenceLearning, Inc Contract (Renewal)

**Section:** XI. Business/Financial Services  
**Item:** B. Approval of PresenceLearning, Inc Contract (Renewal)  
**Purpose:** Vote  
**Submitted by:** Christine Feher  
**Related Material:** CalPac and Presence Kanga Renewal.pdf

### BACKGROUND:

Under Governor's orders, CalPac must serve students virtually, including Special Education services. PresenceLearning, Inc's Kanga program leads the industry in online assessments and teletherapy platforms for School Psychologists and Speech-Language Pathologists. CalPac will utilize this platform to administer Special Education assessments and services as required by student Individualized Education Plans.

### RECOMMENDATION:

It is recommended the Board approve the Kanga Teletherapy Professional Development and Platform License Agreement with PresenceLearning, Inc.



## Service Order

### Customer Name and Contact Information

Name: California Pacific Charter School of San Diego - CA

Address: 940 South Coast Drive #185 Costa Mesa, CA

### Customer Primary Point of Contact

Name: Daisy Carlos

Email Address: dcarlos@cal-pacs.org

### Customer Secondary Point of Contact

Name: **Christine Feher**

Email Address: **Cfeher@cal-pacs.org**

### PresenceLearning Contact Information

Name: Cristy Emery

Email Address: cristy.emery@presencelearning.com

## Service Order

### Other Fees

Licenses	Service	Price	Total
2	Kanga - Elite	\$3,600.00	\$7,200.00
4	Kanga - Pro	\$2,700.00	\$10,800.00
0	Kanga - Premier	\$2,000.00	\$0.00
7	Kanga - Premier AA	\$2,000.00	\$14,000.00

## Service Order

Service Order Term	July 1, 2023 through June 30, 2024
--------------------	------------------------------------



## Service Order Form

Except as expressly set forth in this Service Order, the parties agree to be bound by the terms of the Master Service Agreement ("Agreement"). To the extent there is any conflict between this Service Order and the Agreement, this Service Order shall govern. The terms of this Service Order are confidential information.

The parties have executed this Service Order as of the date of the last signature ("Service Order Effective Date").

PresenceLearning, Inc.

Customer

By:

By:

Name:

Name: **Christine Feher**

Title:

Title: **Superintendent/CEO**

Date:

Date:

## Master Service Agreement

This Master Services Agreement (“MSA”) is entered into as of the date of the last signature set forth on the signature page attached hereto (“Effective Date”), by and between PresenceLearning, Inc., a Delaware corporation with a place of business located at 530 Seventh Ave, Suite 501, New York, NY 10018 (“Presence”), and the undersigned customer (“Customer”). Each of Presence and Customer may individually be referred to as a “Party” and collectively referred to as the “Parties”.

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, Presence and Customer, hereby agree as follows:

### 1. Structure of the Agreement.

This MSA shall apply each time Customer engages with Presence for the provision of services and/or products (“Services”). The Services shall be described in one or more schedules (each, a “Schedule”), service orders (each, a “Service Order”), and/or exhibits (each, an “Exhibit”), each of which shall reference this MSA and, with respect to each Schedule or Service Order, shall be executed by the Parties. Each Schedule, Service Order, and Exhibit entered into or delivered hereunder (each an “Incorporated Document”, and collectively, “Incorporated Documents”) may provide additional terms and conditions related to the Services. This MSA and the Incorporated Documents are collectively referred to herein as the “Agreement”. In the event of a conflict between the terms of this MSA and the terms of any Incorporated Document, the terms of the MSA shall control; provided, however, that the Parties may in any Incorporated Document specifically (i.e., with reference to the MSA) agree to: (a) exclude or except an otherwise controlling provision of this MSA; (b) adopt a clause or provision to apply in lieu of an otherwise controlling provision of this MSA; or (c) reference a governing external code, document, or standard that will apply in lieu of any otherwise controlling provision of this MSA (or any Incorporated Document).

### 2. Fee and Payment Terms.

Customer shall pay all fees (collectively, “Fees”) specified in the Schedule or Service Order for the Services being purchased. Fees are due and payable thirty (30) calendar days from date of invoice, unless specified otherwise in a Service Order. Customer may dispute an invoice no later than twenty (20) calendar days from the date of the invoice. The Parties will work together in good faith to resolve any disputes as soon as possible. Upon resolution, Customer shall remit the amount owed within ten (10) calendar days. Customer is responsible for all taxes, except for taxes on Presence’s income, unless Customer provides a state tax exemption certificate. If Customer does not submit a tax exemption certificate to Presence, Customer will be invoiced for any applicable taxes.

### 3. Term; Termination; Effects of Termination.

3.1. Term. The term of this MSA commences on the Effective Date and continues until terminated by either party pursuant to Section 3.2 (such period, the “Term”). Each Incorporated Document shall have the term specified therein.

3.2. Termination. This MSA or any Incorporated Document may be terminated: (a) by either Party without cause upon thirty (30) calendar days prior written notice to the other Party; (b) by Presence upon any failure of Customer to pay when due any Fees (as defined in Section 2) if such Fees are not being disputed in good faith in accordance with Section 2 and such failure continues uncured for a period of thirty (30) calendar days after Presence provides written notice of the non-payment; provided, however, that in lieu of terminating the MSA or any Incorporated Document, Presence may, at its sole option, suspend Services, in whole or in part; (c) by either Party with cause upon a non-payment related material breach of the Agreement by the other Party which breach is not cured within fifteen (15) calendar days after the breaching Party receives written notice of the breach from the non-breaching Party; or (d) immediately if the other Party becomes insolvent or declares bankruptcy.

3.3. Effects of Termination. Upon the termination of the MSA or the expiration or termination of any Incorporated Document for any reason, (a) all Fees owed to Presence that accrued before such termination or expiration will be immediately due and payable, except for any such amounts being disputed in good faith by Customer in accordance

with Section 2 and (b) Customer shall not be entitled to a refund for any annual Fees paid by Customer prior to the date of termination of the MSA or any Incorporated Document.

#### **4. Services; Platform; Platform Specifications.**

4.1. Services. Presence shall provide Customer with the Services and technical support set forth on each Service Order.

4.2. Platform. All Services shall be delivered via Presence's proprietary cloud-based platform (together with any components, software, or related documentation, the "Platform"). The applicable license granted by Presence to Customer with respect to Platform usage will be as set forth in the applicable Service Order.

4.3. Platform Specifications. The Platform is a cloud application. In order to access the Platform, a user must have a computer with a dual core processor and 2 GB RAM that has the ability to support a headset and microphone and a broadband internet connection with a minimum of 500 kbps (or higher) with upload and download speeds of 1mbps (or higher). Presence will provide technical support on weekdays between the hours of 8:00AM and 8:00PM (Eastern time). Customer may purchase required equipment from Presence pursuant to the terms and conditions set forth on the Equipment Schedule. Additional information regarding Platform specifications can be found at: <https://www.presencelearning.com/tech-requirements/>.

#### 4.4. Platform Restrictions.

4.4.1. Customer shall not for itself or through a third party (and shall ensure that its authorized users and students do not): (i) translate, reverse engineer, decompile, or disassemble the Platform, or by any other method attempt to derive source code to the Platform; (ii) sublicense, rent, lease, loan, assign, transfer, share, or resell the Platform; (iii) make the Platform available to third parties; (iv) create derivative works based on the Platform, or use the Platform for any purpose other than as provided for in this Agreement (including, without limitation, altering any notices of intellectual property or other proprietary rights); or (v) make copies of documentation contained within the Platform.

4.4.2. If Customer breaches the terms of this Agreement or if Customer or any of its authorized users or students misuse the Platform or violate any laws with respect to the Platform, Presence may terminate or suspend Customer's and its authorized users' and students' access to the Platform and remove any material it deems offensive or in violation of this Section 4.4.2. Neither Customer, its authorized users, or customers may:

4.4.2.1. Circumvent any access or use restrictions put into place to prevent certain uses of the Platform or areas of the Platform or attempt to disable, impair, or destroy the Platform by, among other things, uploading, transmitting, storing, or making available any materials that contain any viruses, malicious code, malware, or any components;

4.4.2.2. Engage in behavior that violates any copyright, moral rights, trademark, trade dress, patent, trade secret, unfair competition, right of privacy, right of publicity, or any other proprietary rights of any third party;

4.4.2.3. Upload to the Platform and/or share any material that is unlawful, harmful, threatening, obscene, violent, abusive, tortious, defamatory, libelous, vulgar, lewd, profane, hateful, or otherwise objectionable, as determined in the sole discretion of Presence, or share any of materials that sexualizes minors or that is intended to, or could potentially, facilitate inappropriate interactions with minors, or other users;

4.4.2.4. Impersonate any person or entity, or falsely state or otherwise misrepresent their affiliation with a person or entity;

4.4.2.5. Disrupt, interfere with, or inhibit any other user from using the Platform (such as stalking, intimidation, harassment, or incitement or promotion of violence or self-harm);

4.4.2.6. Engage in chain letters, junk mails, pyramid schemes, phishing, spamming, fraudulent activities, send unsolicited messages, or place any advertisements of any products or services in the Platform; or

4.4.2.7. Take photos or screenshots of the Platform and/or post on social media or engage in any other behavior that violates the confidentiality of Platform.

## **5. Parties' Proprietary Rights; Use of Customer Intellectual Property; Content Restrictions; Removal of Content; Other Rights.**

5.1. Parties' Proprietary Rights. Presence owns all right, title, and interest in and to the Platform and retains all rights and title to all proprietary content in the Platform, including therapy playlists and related documents and content, and retains all right, title and interest to any work product or other intellectual property developed and/or created by, or on behalf of, Presence (collectively, "Presence Intellectual Property"). Customer owns all right, title, and interest in and to any Customer proprietary content (collectively, "Customer Intellectual Property").

5.2. Use of Customer Intellectual Property. During the Term, Customer grants to Presence, solely in connection with Presence's performance of its obligations hereunder, a non-exclusive, royalty-free license to modify, display, combine, copy, store, transmit, and otherwise use Customer Intellectual Property that is uploaded to the Platform. Further, by uploading Customer Intellectual Property to the Platform, Customer and its authorized users of the Platform grant Presence a perpetual, non-exclusive, royalty-free license to modify, display, combine, copy, store, transmit, and otherwise use the materials.

5.3. Other Rights. Customer grants to Presence the limited right to use Customer's name, logo and/or other marks for the sole purpose of listing Customer as a customer in promotional materials. Customer may revoke this grant at any time by notifying Presence in writing and such revocation will be effective within fifteen (15) calendar days of the receipt of the notice.

## **6. Confidentiality.**

6.1. Confidential Information. All information disclosed by one Party (in such capacity, the "Disclosing Party") to the other Party (in such capacity, the "Receiving Party") during the Term that is either identified in writing at the time of disclosure as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of the disclosure, whether in oral, written, graphic or electronic form, shall be deemed to be "Confidential Information."

6.2. Exceptions. Information will not be considered Confidential Information if the information is or was: (i) publicly available through no act or omission of the Receiving Party; (ii) in the Receiving Party's lawful possession prior to disclosure by the Disclosing Party and not obtained either directly or indirectly from the Disclosing Party; (iii) lawfully disclosed to the Receiving Party by a third party without restriction on disclosure; or (iv) independently developed by the Receiving Party without use of or access to the Disclosing Party's Confidential Information.

6.3. Nondisclosure. The Parties agree, that during the Term and for a period of one year thereafter (or, as applicable, with respect to Confidential Information that is a trade secret, indefinitely) after its termination, to hold each other's Confidential Information in confidence and not to disclose such information in any form to any third party without the express written consent of the disclosing party, except to employees, subcontractors, or agents (collectively, "Representatives") who are under a written non-disclosure agreement protecting the applicable Confidential Information in a manner no less restrictive than this Agreement. Each Party shall remain responsible for any breaches of this Section 6.3 by any of such Parties' Representatives.

**7. Customer Data.** Customer retains all rights, in and to all data, files, information, provided by Customer or its authorized users to Presence.

## **8. Indemnification.**

**8.1. Indemnification by Customer.** Unless prohibited by law or school district regulations, Customer shall indemnify and hold Presence harmless against any and all claims, demands, damages, liabilities and costs (including reasonable attorney's fees) incurred by Presence or its Representatives which (a) result from, or arise in connection with, (i) any breach of Customer's obligations or representations under this Agreement, including, without limitation, any breach of Section 12.3 below, or (ii) a negligent act or omission or willful misconduct of Customer, its agents, or employees, pertaining to its activities and obligations under this Agreement, and/or (b) resulting from, arising out of, or relating to any third party lawsuit or proceeding brought against Presence due to (x) Customer's or its authorized users' posted and uploaded content, (y) Customer's or its authorized users' illegal behavior or conduct, or (z) Customer's or its authorized users use of the Platform or any Presence property in any manner inconsistent with or in breach of this Agreement (collectively, "Presence Indemnifiable Claims"), including reasonable costs incurred in connection with preparing to defend against any Presence Indemnifiable Claims.

**8.2. Indemnification by Presence.** Presence shall indemnify and hold Customer and its Representatives, harmless against any and all claims, demands, damages, liabilities and costs (including reasonable attorney's fees) incurred by Customer which, directly or indirectly, result from, or arise in connection with, any negligent act or omission or willful misconduct of Presence, its agents, or employees, pertaining to Presence's activities and obligations under this Agreement (collectively, "Customer Indemnifiable Claims"), including reasonable costs incurred in connection with preparing to defend against any Customer Indemnifiable Claims.

**8.3. Conditions of Indemnification.** The obligations set forth in Sections 8.1 and 8.2 are conditioned upon: (a) prompt written notice by the indemnified party to the indemnifying party of any claim, action or demand for which indemnity is claimed; (b) complete control of the defense and settlement thereof by the indemnifying party, provided that no settlement of an indemnified claim shall be made without the consent of the indemnified party, such consent not to be unreasonably withheld or delayed; and (c) reasonable cooperation by the indemnified party in the defense as the indemnifying party may request. The indemnified party shall have the right to participate in the defense against the indemnified claims with counsel of its choice at its own expense.

## **9. Limitation of Liability.**

**9.1. DAMAGE DISCLAIMER.** EXCEPT AS PROVIDED BELOW IN THIS SECTION 9, IN NO EVENT SHALL EITHER PARTY BE LIABLE FOR ANY CONSEQUENTIAL, INDIRECT, INCIDENTAL, PUNITIVE, OR SPECIAL DAMAGES WHATSOEVER, INCLUDING WITHOUT LIMITATION, DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, AND THE LIKE, ARISING OUT OF THIS AGREEMENT, EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

**9.2. GENERAL DAMAGE CAP.** EXCEPT AS PROVIDED ELSEWHERE IN THE AGREEMENT, IN NO EVENT SHALL PRESENCE BE LIABLE IN THE AGGREGATE FOR ANY DAMAGES OR LOSSES IN EXCESS OF THE GREATER OF THAN THE AMOUNT CUSTOMER PAID FOR SERVICES DURING A THREE-MONTH PERIOD PRECEDING THE EVENT GIVING RISE TO THE LIABILITY. THESE LIMITATIONS APPLY TO THE MAXIMUM EXTENT PERMITTED BY LAW EVEN IF (A) A REMEDY DOES NOT FULLY COMPENSATE CUSTOMER FOR ANY LOSSES OR (B) PRESENCE KNEW OR SHOULD HAVE KNOWN ABOUT THE POSSIBILITY OF DAMAGES.

## **10. Disclaimer of Warranties.**

Except as otherwise set forth herein, the Services and Platform are provided "as is" without any warranty and, except as provided herein, Presence expressly disclaims any and all warranties, express, implied, or statutory, including warranties of title, non-infringement, merchantability, and fitness for a particular purpose. Further, Presence disclaims any warranty that the Platform will meet Customer's requirements or will be constantly available, uninterrupted, timely, secure, or error-free. In addition, Presence disclaims all liability for any actions resulting from Customer's use of the Platform. Customer understands that Customer's use and access to the Platform is at Customer's own discretion and risk, and Customer is solely responsible for any damage to computer systems or loss of data that results from such use. If Customer's users post or upload materials to the Platform, Presence is not responsible for any loss, corruption, damage, deletion of the materials.

## 11. Representations and Warranties

11.1. Power and Authority. Each Party represents that it has the full right, power, and authority to enter into this Agreement.

11.2. Platform Performance. Customer agrees and acknowledges that Customer has assessed the Platform's necessary specifications, performance, functionality, access to, and availability, and found it suitable for Customer's needs and requirements.

11.3. Uploaded Materials. Customer, for itself and on behalf of its authorized users, asserts that the party uploading materials to the Platform has all rights necessary to upload, share, and grant the rights set forth in this Agreement for all the materials.

11.4. Safety of Platform. Presence warrants to Customer that Presence has used commercially reasonable efforts to prevent the introduction of, and to the knowledge of Presence, the Platform does not contain any, software viruses, time or logic bombs, trojan horses, worms, timers or clocks, trap doors or other malicious computer instructions, devices, or techniques.

## 12. Miscellaneous.

12.1. Compliance with Laws. Each Party shall comply with all laws, rules and regulations, if any, applicable to it in connection with the performance of its obligations under the Agreement.

12.2. Competitors. Customer agrees, and will ensure its authorized users' and student's compliance, to not share or make available the Platform or Presence Property to a competitor of Presence.

12.3. Survival. Sections 2, 4.4, 5.1, 8 –11, and 13 will survive expiration or termination of this Agreement.

12.4. Amendments and Modifications. Any amendment and modifications to this Agreement must be in writing, reference the Agreement, and be executed by both Parties.

12.5. Third Party Beneficiaries. This Agreement is not intended to benefit, nor shall it be deemed to give rise to, any rights to any third party.

12.6. Assignment. Customer shall not assign or otherwise transfer its rights or delegate its obligations under the Agreement, in whole or in part, without the prior written consent of Presence and any attempt to do so will be null and void. Presence may assign or transfer its rights to an affiliate or to a third party due to a merger, consolidation, change of control, sale of all or substantially all of its securities or assets, contract, management agreement, or otherwise.

12.7. Force Majeure. Neither Party shall be liable for failing or delaying performance of its obligations (except for the payment owed for services rendered) resulting from any condition beyond its reasonable control, including but not limited to, governmental action, acts of terrorism, earthquake, fire, flood, epidemics, pandemics or other acts of God, labor conditions, power failure, and Internet disturbances. Presence will not be responsible for receiving data, queries, or requests directly from Customer's authorized users, student users, or any other third party, or for the transmission of data between Customer's authorized users or student users and the Platform.

12.8. No Waiver. The failure to require performance of any provision of this Agreement shall not affect a Party's right to require performance at any time thereafter; nor shall any waiver of a breach of any provision constitute a waiver of the provision itself.

12.9. Notices. All notices relating to this Agreement must be in writing, sent by postage prepaid first-class mail, courier service, or via email: To Presence send to: PresenceLearning, Inc., 530 Seventh Ave, Suite M1, New York, NY 10018, Attn: Legal Department or via email at legal@presencelearning.com. To Customer: Notices will be sent to the physical or email address provided to Presence, or by other legally acceptable means.



12.10. Independent Contractors. The Parties are and shall remain independent contractors and nothing in this Agreement shall be deemed to create any agency, partnership, or joint venture relationship between the Parties. Neither Party shall be deemed to be an employee or legal representative of the other nor shall either Party have any right or authority to create any obligation on behalf of the other Party.

12.11. Arbitration. Any controversy or claim arising out of or relating to this Agreement, or the breach thereof, shall be settled by arbitration administered by the American Arbitration Association (“AAA”) in accordance with its Commercial Arbitration Rules, and judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof. The arbitration proceedings shall be confidential and conducted in the English language before a single neutral arbitrator to be selected by AAA. The place of arbitration shall be mutually agreed upon by the Parties.

12.12. Entire Agreement. This Agreement, including any Incorporated Documents, constitutes the entire agreement between the Parties with respect to the subject matter and supersedes all other prior agreements and understandings, both written and oral, between the Parties.

12.13. Governing Law. This Agreement and all disputes or controversies arising out of or relating to this Agreement are governed by the law of the state the Customer is located.

12.14. Counterparts; Electronic Signatures. This Agreement may be executed in one or more counterparts, each of which shall be deemed to be an original but all of which together shall constitute one and the same instrument and shall become effective when one or more counterparts have been signed by each of the Parties and delivered to the other Party. A facsimile, PDF, or other electronic signature of this Agreement shall be valid and have the same force and effect as a manually signed original.

PresenceLearning, Inc.	LEA
By:	By:
Name:	Name: <b>Christine Feher</b>
Title:	Title: <b>Superintendent/CEO</b>
Date:	Date:





## EQUIPMENT PURCHASE SCHEDULE

This Equipment Purchase Schedule (the “Equipment Purchase Schedule”) is incorporated and made part of the Agreement between Presence and Customer and lists the terms and conditions upon which Customer may purchase hardware, Test Kits, OT Kits and materials (collectively “Equipment”) from Presence. Unless otherwise defined herein, capitalized terms shall have the definition set forth in the MSA.

1. **Hardware Available for Purchase.** Customer may, at Customer’s option, purchase the hardware set forth below at the purchase prices set forth opposite each hardware type (note that the listed prices do not include any applicable tax or shipping costs):

Equipment Type	Price per unit
Standard webcam with tripod	\$49.00
ANDREA Over Ear USB headset	\$29.00
ANDREA 455 Stereo headset	\$25.00
ANDREA Y-100B Splitter	\$5.00
ANDREA USB Sound Card Adapter	\$14.00
Document Camera	\$90.00

Customer is not restricted from purchasing hardware from any other vendor or any third-party. A list of the recommended hardware providers and specifications is provided in Section 8 hereof.

2. **WISC-V and WAIS-IV Kits.**

2.1 Purchase of WISC-V Kits and/or WAIS -IV Kits. If Customer may access WISC-V and/or WAIS-IV assessments, Customer may purchase WISC-V and/or WAIS-IV test kits (each, a “Test Kit”) from Presence. Test Kits are not included in the price of the assessments. Each Test Kit comes with one (1) set of Block Design Blocks and one (1) Block Design Stimulus Book for use in connection with the WISC-V and/or WAIS-IV assessments. Prices of the Test Kits will be reflected in the Service Order entered into at the time the Test Kits are to be purchased.

WISC-V / WAIS -IV	Price per unit
<b>Block Design only</b> Stimulus Book	\$11.00
Block Design Blocks	\$46.00

2.2 Tracking and Return of Kits. Customer understands and acknowledges that the Test Kits are considered trade secrets by their respective publishers and will make commercially reasonable efforts to retrieve the Test Kit from each student who received one. After a Test Kit has been used by a student, Customer must arrange for the return of the Test Kit directly to Customer. On a quarterly basis, Customer will acknowledge and confirm to Presence that the Test Kits are in Customer’s possession (in a mutually agreed upon manner). At no time will a Test Kit remain in the possession of a Customer’s student once it has been used.

3. **OT Kits.** Customer may purchase Occupational Therapy Kits (each, an “OT Kit”) for a fee of \$85.00 per OT Kit. Each OT Kit includes materials that may be utilized in occupational therapy sessions.

4. **Delivery and Delivery Address; Title; Risk of Loss.**

4.1 Delivery and Delivery Address. Presence will ship Equipment to the addresses provided by Customer. Customer is solely responsible for providing the correct shipping address for each addressee that is to receive the Equipment. If Customer provides an incorrect address, then Customer will purchase replacement Equipment that will be delivered to the correct address. If Equipment is misdelivered due to Presence’s error, Presence will promptly ship replacement Equipment to the correct address at no cost to Customer.

4.2 FOB. Presence shall ship and deliver the Equipment FOB destination, and the title to and risk of loss of the Equipment will pass to Customer upon delivery.

4.3 **Delivery Dates.** All delivery dates are approximate. Presence shall not be liable for any losses, damage, penalties or expenses for failure to meet any expected delivery date.

4.4 **Received and Accepted.** Equipment is deemed received and accepted upon delivery to the address provided by Customer.

5. **Inspection of Goods.** Customer has the right to examine the Equipment upon receipt and has 3 days in which to notify Presence of any claim for damages based on the condition of the Equipment. Such notice must specify in detail the particulars of the claim. Failure to provide such notice within the requisite time period constitutes irrevocable acceptance of the equipment. Defective Equipment must be returned to Presence in accordance with accepted trade practices.
6. **Fees; Payment.** Customer agrees to pay for the Equipment according to the terms set forth in the applicable Service Order. Customer is responsible for all taxes and shipping, which fees may vary based on shipment destination.
7. **Disclaimer of Warranty.** Presence is not the manufacturer of the Equipment and the Equipment is being sold “as is,” and Presence disclaims all warranties of quality, whether express or implied, including the warranties of merchantability and fitness for particular purpose.
8. **Delay or Failure to Perform.** Presence will not be liable to Customer for any delay, non-delivery or default due to labor disputes, transportation shortage, Acts of God, or any other causes outside of Presence’s control. Presence shall notify Customer immediately upon realization that it will not be able to deliver the Equipment as promised.
9. **Suggested Hardware Specification.** The following is a list of suggested hardware and specifications for use in clinical services:

Hardware Type	Requirements	Suggested Brand	Suggested Model
Webcam with tripod	<ul style="list-style-type: none"> <li>• Attachable tripod</li> <li>• Video resolution 1920X1080</li> <li>• Auto focus</li> <li>• Field of View = 65°</li> </ul>	N/A	N/A
Headset	<ul style="list-style-type: none"> <li>• Noise-canceling microphone</li> <li>• 40mm stereo speakers with deep bass sound deliver crystal clear audio</li> </ul>	ANDREA	EDU-455 STEREO HEADSET
Headset USB	<ul style="list-style-type: none"> <li>• Noise-canceling microphone</li> <li>• 40mm stereo speakers with deep bass sound deliver crystal clear audio</li> </ul>	ANDREA	OVER EAR USB NC-455VM
Splitter	<ul style="list-style-type: none"> <li>• Splitter cable allows you to connect 2 headphones simultaneously to your computer so parents and providers can monitor and listen to what the student is hearing</li> </ul>	ANDREA	Y-100B
Sound card	<ul style="list-style-type: none"> <li>• External USB headset adapter with CD quality digital sample rates</li> <li>• Bypasses a computer's sound system, creating superior low-noise audio</li> </ul>	ANDREA	EDU-USB PL-CS-PRESENCE
Document camera	<ul style="list-style-type: none"> <li>• Capture images of A4 and US letter pages</li> <li>• Built-in LED lights</li> </ul>	HUE	HD Pro Camera

## PLATFORM LICENSE SCHEDULE

This Platform License Schedule (“Platform License Schedule”) is incorporated and made part of the Agreement between Presence and Customer and lists the terms and conditions for the Platform License. Capitalized terms not defined in this Platform License Schedule shall have the meaning set forth in the MSA. In the event of a conflict between this Platform License Schedule and the MSA, unless specifically referenced herein, the MSA shall govern.

1. **DEFINITIONS.** With respect to all Services provided pursuant to this Platform License Schedule, the following terms shall have the meanings set forth below:

“Authorized Users” or “Authorized User” means Customer’s teachers or staff who are recruited, managed, and employed or contracted by Customer, and for whom a license is purchased.

“Clinical Workshops” means access to the following workshops as shall be set forth in the Service Order:

- Clinical Workshops for Speech-Language Pathologists;
- Clinical Workshops for Occupational Therapists;
- Clinical Workshops for School Psychologists and Behavioral & Mental Health Professionals; and
- Clinical Workshops for Educators and Support Personnel.

“Improvement” means any invention, modification, addition, derivative work, enhancement, revision, translation, abridgment or expansion to or arising from a work, or any other form in which a work or any part thereof, may be recast, transformed, or adapted.

“Personal Information” and/or “PI” means information that can identify a specific individual.

“Student Data” means any PI belonging to a Student User.

“Student User” or “Student Users” means the Customer’s students currently enrolled at Customer’s organization.

“Telehealth Institute” means proprietary self-guided training modules.

“Therapy Room” means a clinician-specific web-based online room on the platform only accessible by specific link controlled by the clinician to whom a virtual therapy room is assigned.

2. **LICENSE.**

- 2.1 License Grant. During the Service Order Term (as such term is defined in the Service Order), Presence grants to Customer a limited, non-exclusive, revocable, non-sublicensable, royalty-free, license for each Authorized User to use and display the Platform (the “License”).
- 2.2 Business Use. Customer agrees that it will inform and instruct its Authorized Users that the Platform and Presence Intellectual Property are solely and exclusively to be used for the benefit of the Customer and Customer’s Student Users (“Business Use”). Authorized Users may not use the Platform or any Presence Intellectual Property for personal or independent business purposes. The use of the Platform and/or Presence Intellectual Property for any purpose other than Business Use will constitute cause for immediate termination of this Platform License.
- 2.3 Disclosure of Improvements and Developments. Unless otherwise provided herein, Presence will have no obligation to disclose to Customer any Platform Improvements.
- 2.4 Acknowledgements. Customer acknowledges and agrees that Presence is in the business of commercially licensing the Platform and providing services relating to the Platform to third parties and that the Platform may contain errors. PRESENCE SHALL NOT HAVE ANY DUTIES OR RESPONSIBILITIES OTHER THAN THOSE SPECIFICALLY SET FORTH IN THE INCORPORATED DOCUMENTS AND NO IMPLIED OBLIGATIONS SHALL BE READ INTO THE INCORPORATED DOCUMENTS.

3. **PLATFORM FEES.** The Annual Fee for use of the License shall be set forth in the Service Order and is nonrefundable and payable within thirty (30) days of the signing of the Platform License Schedule.

4. **SERVICE OPTIONS:**

Service Option	Description
Therapy Essentials - Starter	<ul style="list-style-type: none"> <li>● Limited monthly access to private therapy room, activities, and games.</li> <li>● Organizational and documentation tools and features.</li> <li>● Administrator Dashboard that enables one administrator to track usage of the account.</li> </ul>
Therapy Essentials - Premier	<ul style="list-style-type: none"> <li>● Unlimited access to private therapy room, activities, and games.</li> <li>● Organizational and documentation tools and features.</li> <li>● Administrator Dashboard that enables one administrator to track usage of the account.</li> </ul>
Therapy Essentials - Pro	All the benefits of the Therapy Essentials - Premier plus the ability for each Authorized User to administer up to 50 components/batteries of assessments per year. The selection of available assessments will be based on the administering Clinician's discipline.
Therapy Essentials - Elite	All the benefits of the Therapy Essentials Premier plus each Clinician will have unlimited access to all assessments within the Clinician's discipline, including, as applicable, all speech, cognitive ability, and academic assessments.
Therapy Essentials - Premier Academic Achievement (For SPED Ed and Gen Ed teachers who only need access to assessments)	<p>Access to private therapy room and unlimited access to academic achievement assessments.</p> <p>Administrator Dashboard that enables one administrator to track usage of the account.</p>

Customer may designate alternate Authorized Users for Therapy Essentials – Premier, Therapy Essentials – Pro, Therapy Essentials – Elite, and Therapy Essentials – Premiere Academic Achievement and, if applicable, all such Authorized Users will have access to assessments specific to their disciplines.

**EXHIBIT 1 TO PLATFORM LICENSE SCHEDULE**

**SPEECH-LANGUAGE ASSESSMENTS**

Clinical Evaluation of Language Fundamentals-5 Screener (CELF-5 Screener)  
 Clinical Evaluation of Language Fundamentals-5 (CELF-5)  
 Clinical Evaluation of Language Fundamentals-5 Metalinguistics (CELF-5 Meta)  
 Clinical Evaluation of Language Fundamentals - Preschool-3 (CELF-P-3)  
 Clinical Evaluation of Language Fundamentals Preschool - 2 (CELF-P-2)  
 Clinical Evaluation of Language Fundamentals - Preschool-2 Spanish (CELF-P-2 Spanish)  
 Comprehensive Assessment of Spoken Language, 2nd Ed. (CASL-2)  
 Goldman-Fristoe Test of Articulation-3 (GFTA-3)  
 Arizona Articulation Phonology Scale, 4th Ed. (Arizona-4)  
 Peabody Picture Vocabulary Test, 5th Ed. (PPVT-5)  
 Expressive Vocabulary Test, 3rd Ed. (EVT-3)  
 Comprehensive Test of Phonological Processing, 2nd Ed. (CTOPP-2)  
 Gray Oral Reading Test-5 (GORT-5)  
 Test of Auditory Processing Skills – Fourth Edition (TAPS-4)  
 Test of Auditory Processing Skills - Third Edition - Spanish (TAPS-3 Spanish)  
 Oral and Written Language Scales-2 (OWLS-2)  
 Clinical Evaluation of Language Fundamentals, 4th Ed., Spanish (CELF-4-Spanish)  
 Expressive One-Word Picture Vocabulary Test-4: Spanish-Bilingual Edition (EOWPVT-4-Spanish)  
 Receptive One-Word Picture Vocabulary Test-4: Spanish-Bilingual Edition (ROWPVT-4-Spanish)  
 Expressive One-Word Picture Vocabulary Test-4 (EOWPVT-4)  
 Receptive One-Word Picture Vocabulary Test-4 (ROWPVT-4)  
 Goldman-Fristoe Test of Articulation, 3rd Ed., Spanish (GFTA-3-Spanish)  
 Test of Language Development-Primary-5 (TOLD-P-5)  
 Test of Language Development-Intermediate-5 (TOLD-I-5)  
 Test of Pragmatic Language - 2nd Edition (TOPL-2)  
 Receptive-Expressive Emergent Language Test - Fourth Edition (REEL-4)  
 Oral Passage Understanding Scale (OPUS)  
 Autism Diagnostic Observation Schedule - 2nd Edition (ADOS-2) \*PL clinicians can only be observers - there has to be a trained facilitator with the child\*  
 Children’s Communication Checklist-2nd Edition (CCC-2)  
 Khan-Lewis Phonological Analysis 3rd Edition (KLPA-3)  
 Phonological and Print Awareness Scale (PPA)  
 School Function Assessment (SFA)  
 Stuttering Severity Instrument 4th Edition (SSI-4)

**PSYCHOEDUCATIONAL ASSESSMENTS**

**Cognitive Assessments**

Wechsler Intelligence Scale for Children-Fifth Edition (WISC-V)  
 Woodcock-Johnson IV Test of Cognitive Abilities (WJ IV COG)  
 Bateria IV Cognitive Battery  
 Woodcock-Johnson IV Early Cognitive and Academic Development (ECAD)  
 Comprehensive Test of Nonverbal Intelligence – Second Edition (CTONI-2)  
 Test of Nonverbal Intelligence – Fourth Edition (TONI-4)  
 Preschool Test of Nonverbal Intelligence (PTONI)  
 Kaufman Brief Intelligence Test – Second Edition (KBIT-2)  
 Wechsler Adult Intelligence Scale – Fourth Edition (WAIS-IV)  
 Wechsler Intelligence Scale for Children – Fifth Edition Spanish (WISC-5 Spanish)  
 Cognitive Assessment System - 2nd edition (CAS-2)  
 Cognitive Assessment System - 2nd Edition: BRIEF (CAS-2: BRIEF)  
 Developmental Assessment for Individuals with Severe Disabilities Third Edition (DASH-3)  
 Developmental Assessment for Young Children - Second Edition (DAYC-2)

## **Processing Assessments**

Wechsler Memory Scale – Fourth Edition (WMS-IV)  
Woodcock-Johnson IV Oral Language (WJIV-OL)  
Birth to Three Assessment and Intervention System-Second Edition (BTAIS-2)  
Test of Memory and Learning - Second Edition (TOMAL-2)  
Executive Functions Test-Elementary Normative Update (EFT-E:NU)  
Rapid Automatized Naming and Rapid Alternating Stimulus Tests (RAN/RAS)  
Test of Auditory Processing Skills – Fourth Edition (TAPS-4)  
Test of Auditory Processing Skills - Third Edition - Spanish (TAPS-3 Spanish)  
Preschool Early Numeracy Screener (PENS)  
Comprehensive Test of Phonological Processing – Second Edition (CTOPP-2)  
Autism Diagnostic Observation Schedule - 2nd Edition (ADOS-2) \*PL clinicians can only be observers - there has to be a trained facilitator with the child\*  
Beery Visual Motor Integration Test (Beery VMI)  
School Function Assessment (SFA)

## **Academic/Achievement Assessments**

Woodcock-Johnson IV Tests of Achievement (WJ IV ACH)  
Batería IV Achievement Battery  
KeyMath – 3 Diagnostic Assessment  
Gray Oral Reading Tests – Fifth Edition (GORT-5)  
Gray Silent Reading Test (GSRT)  
Kaufman Test of Educational Achievement – 3rd Edition (KTEA-3)  
Kaufman Test of Educational Achievement Brief Form – 3rd Edition (KTEA-3 Brief)  
Wechsler Individual Achievement Test – Fourth Edition (WIAT-4)  
Oral and Written Language Scales-2 (OWLS-2)  
Oral Passage Understanding Scale (OPUS)  
Preschool Early Numeracy Screener (PENS)  
Jordan Dyslexia Assessment/Reading Program - Second Edition  
School Function Assessment (SFA)

## **OCCUPATIONAL THERAPY ASSESSMENTS**

Motor-Free Visual Perception Test – Fourth Edition (MVPT-4)  
Developmental Test of Visual Perception - Third Edition (DTVP-3)  
Beery Visual Motor Integration Test (Beery VMI)  
School Function Assessment (SFA)  
Sensory Profile 2nd Edition (SP-2)  
Sensory Processing Measure - Preschool (SPM-P)  
Sensory Processing Measure (SPM)

Please note the following:

- The listed assessments will only be made available to Authorized Users with the verified clinical credentials necessary to administer the assessments;
- Psychoeducational Assessments will only be accessible to Authorized Users who purchase Therapy Essentials Pro or Therapy Essentials Elite;
- The Platform includes electronic versions of the applicable test stimuli and test manuals for each assessment. Customer is responsible for obtaining test protocols, response booklets, equipment, or any test manipulatives that may be required to administer the assessment; and
- Presence is continuously updating its assessment offerings; therefore, the above list is subject to change.