Excel Academy (CA)

Regular Meeting of the Board of Directors

Published on June 9, 2023 at 4:41 PM PDT

Date and Time

Thursday June 15, 2023 at 11:10 AM PDT

Location

Excel Academy Charter Schoo
l
1 Technology Drive, Ste I-811
Irvine, CA 92618

Regus- Gateway Chula Vista
333 H Street, Suite 5000
Chula Vista, CA 91910

Zoom Meeting Information:

Dial In: +1 669 444 9171 US
Meeting ID: 846 3469 9861
Zoom URL: https://us06web.zoom.us/j/84634699861

MISSION STATEMENT

Excel Academy will provide a flexible, personalized learning experience where teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student.

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

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 Excel Academy Charter Schools.

Agenda

		Presenter	Time
I.	**Opening Items**		**11:10 AM**
A.	Call the Meeting to Order	William Hall	1 m
B.	Record Attendance	William Hall	1 m

Roll Call:
William Hall, President
Michael Humphrey, Vice President
Steve Fraire, Clerk
Susan Houle, Member
Larry Alvarado, Member

II.	**Pledge of Allegiance**		**11:12 AM**
A.	Led by Board President or designee.	William Hall	1 m
III.	**Approve/Adopt Agenda**		**11:13 AM**
A.	Agenda	William Hall	1 m

It is recommended the Board of Directors adopt as presented, the agenda for the Regular Board meeting of June 15, 2023.

Roll Call Vote:
William Hall

Presenter Time

Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

IV. Approve Minutes 11:14 AM

A. Minutes of the Regular Board Meeting held on May 11, 2023 William Hall 1 m

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
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 11:15 AM

A. The Board will consider and may act on any of the Closed Session matters. 1 m

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

VII. Closed Session 11:16 AM

		Presenter	Time
A.	Closed Session		15 m

1. Conference with Legal Counsel - Existing Litigation (Gov. Code Section 54956.9(d)(1))

TR v. The Collaborative Charter Services Organization, et al

VIII.	**Reconvene Regular Meeting**		**11:31 AM**
A.	Report out any action taken in closed session.	William Hall	5 m

IX. Public Comments/Recognition/Reports

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.

X.	**Correspondence/Proposals/Reports**		**11:36 AM**
A.	School Highlights - Presented by Heidi Gasca, Executive Director/CEO	Heidi Gasca	5 m
B.	Year in Review - Video	Heidi Gasca	4 m

Year in Review Video

XI.	**Consent**		**11:45 AM**

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 upon the request of any member of the Board, discussed, and acted upon separately.

A. Consent - Business/Financial Services

1. Check Register - May 2023

Presenter Time

2. Cash Payments - May 2023
3. Approval of increased agreement with CliftonLarsonAllen (CLA)
4. Approval of Hatch & Cesario Agreement for Legal Services for 2023-2024

B. Consent - Education Student/Services

1. Approval of English Learner Master Plan

C. Consent - Personnel Services

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report
3. Job Descriptions
4. Approval of the Teacher of Record Manual for 2023-2024
5. Approval of the Virtual Teacher of Record Manual for 2023-2024

D. Consent Items - Policy Development 1 m

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.

3000 Series - Business/Non-Instructional
3000-EA Fiscal Control Policy: Overview
3005-EA Fiscal Control Policy: Purchasing

5000 Series - Business/Non-Instructional
5000-EA Concepts and Roles
5045-EA Acceptable Use Policy
5110-EA Cellphones & Other Electronic Signaling Devices Policy

Board Policies: Reviewed:
The following policies have been reviewed but have not needed any changes.

5000 Series - Business/Non-Instructional

Presenter Time

5010 - EA Educational Records and Student Info
5015 - EA Title IX
5020 - EA Comprehensive Self-Harm/Suicide Prevention
5030 - EA Immunization Policy
5035 - EA Student Freedom of Speech and Expression
5070 - EA Transgender and Gender Nonconforming Student Nondiscrimination Policy
5085 - EA Communicable, Contagious, or Infectious Diseases
5105 - EA Direct Instruction and Supplemental/Administrative Support Policy

6000 Series - Instructional
6010 - EA Independent Study Policy
6015 - EA CHYA: California Healthy Youth Act Policy Letter
6020 - EA Education for Homeless Children
6025 - EA 504 Policy
6030 - EA Education for Foster Youth
6065 - EA SPED Pin Process for Missed Services
6070 - EA SPED Independent Educational Evaluations
6075 - EA SPED Certificate of Completion
6200 - EA AB130 Satisfactory Educational Progress Policy

Consent items listed under A through D are considered routine and will be approved/adopted by a single motion.

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XII. Business/Financial Services 11:46 AM

A. Approval of Additional Chromebooks Purchase — Joe Sorrera — 5 m

It is recommended the Board approve theApproval of Additional Chromebooks Purchase for 2023-2024 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Presenter Time

Fiscal Impact: $130,865.00
Warner (#2053): $86,370.90
Helendale (#2073): $44,494.10

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

B. Approval of Macbook Laptop Purchase for Staff — Heidi Gasca — 5 m

It is recommended the Macbook Laptop Purchase for Staff for 2023-2024 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: $39,468.68
Warner (#2053): $26,049.33
Helendale (#2073): $13,419.35

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XIII. Personnel Services — 11:56 AM

A. Approval of the One-Time Bonus for Universal Pre-Kindergarten (UPK) Teachers for 2023-24 — Megan Anderson — 5 m

It is recommended the Board approve the One-Time Bonus for Universal Pre-Kindergarten (UPK) Teachers 2023-24 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: $21,000
Warner (#2053): $13,860

Presenter Time

Helendale (#2073): $7,140

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

B. Approval of CharterLIFE Benefits (Renewal) Megan Anderson 8 m

It is recommended the Board approve the CharterLIFE Benefits Renewal for 2023-24 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: See attached premium rates.

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XIV. Public Hearing 12:09 PM

A. Local Indicators and Local Control & Accountability Plan (LCAP) 2023-24 Jenny Craig 10 m

It is recommended the Board enter into a public hearing regarding the LCAP for 2023-24. During the hearing there will be a presentation on the LCAP for 2023-24.

a. 2023-24 LCAP Plan (Helendale)
b. 2023-24LCAP Plan (Warner)

Hearing Open: _____ Hearing Closed: _____

B. Proposed Budget 2023-2024 Joe Sorrera 10 m

It is recommended the Board enter into a public hearing regarding the Proposed Budget for the 2023-24 school year. During the hearing there will be a presentation on the Proposed Budget for the 2023-24 school year.

Presenter Time

a. 2023-24 Preliminary Budget
b. 2022-23 Education Protection Account (EPA) Plan Actuals (Helendale)
c. 2022-23 Education Protection Account (EPA) Plan Actuals (Warner)
d. 2023-24Education Protection Account (EPA) Multi-Year Plan (Helendale)
e. 2023-24 Education Protection Account (EPA) Multi-Year Plan (Warner)
f. 2023-24 Local Control Funding Formula (LCFF) Budget Overview for Parents (Helendale)
g. 2023-24 Local Control Funding Formula (LCFF) Budget Overview for Parents (Warner)

Hearing Open: _____ Hearing Closed: _____

XV. Calendar

The next scheduled Regular Board Meeting will be held on June 22, 2023.

XVI. Comments 12:29 PM

A. Board Comments 5 m

B. CEO Comments 5 m

XVII. Closing Items 12:39 PM

A. Adjourn Meeting

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

FOR MORE INFORMATION
For more information concerning this agenda, contact
Excel Academy Charter School.

Coversheet

Minutes of the Regular Board Meeting held on May 11, 2023

Section:	IV. Approve Minutes
Item:	A. Minutes of the Regular Board Meeting held on May 11, 2023
Purpose:	Approve Minutes
Submitted by:	
Related Material:	Minutes for Regular Meeting of the Board of Directors on May 11, 2023

APPROVED

Excel Academy (CA)

Minutes

Regular Meeting of the Board of Directors

Date and Time
Thursday May 11, 2023 at 11:05 AM

Location

Excel Academy Charter School
1 Technology Drive, Ste I-811
Irvine, CA 92618

Regus- Gateway Chula Vista
333 H Street, Suite 5000
Chula Vista, CA 91910

Zoom Meeting Information:

Dial In: +1 669 444 9171
Meeting ID: 825 0427 2879
Zoom URL: https://us06web.zoom.us/j/82504272879

MISSION STATEMENT

Excel Academy will provide flexible, personalized learning through a customized course of study that will educate, motivate, and instill a love of learning in each individual student. Teachers and parents will join together to maintain high expectations and promote academic excellence for all students creating the next generation of leaders.

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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 Excel Academy Charter Schools.

Directors Present

L. Alvarado, M. Humphrey, S. Fraire, S. Houle, W. Hall

Directors Absent

None

Guests Present

L. Hansen

I. Opening Items

A. Call the Meeting to Order

W. Hall called a meeting of the board of directors of Excel Academy (CA) to order on Thursday May 11, 2023 at 11:11 AM.

B. Record Attendance

II. Approve/Adopt Agenda

A. Agenda

S. Fraire made a motion to Bill Hall.
S. Houle seconded the motion.
Agenda was revised
The board **VOTED** unanimously to approve the motion.

III. Approve Minutes

A.

Minutes of the Regular Board Meeting held on March 9, 2023

L. Alvarado made a motion to approve the minutes from Regular Meeting of the Board of Directors on 03-09-23.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

B. Minutes of the Board Study Session held on April 6, 2023

S. Fraire made a motion to approve the minutes from Board of Directors Study Session on 04-06-23.
S. Houle seconded the motion.
The board **VOTED** unanimously to approve the motion.

IV. Adjourn to Closed Session

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

S. Fraire made a motion to Bill Hall.
L. Alvarado seconded the motion.
The board **VOTED** unanimously to approve the motion.

V. Reconvene Regular Meeting

A. Report out any action taken in closed session.

Board approved an amended evaluation for Heidi Gasca. Great commendations on her eval.

VI. Consent

A. Consent - Business/Financial Services

B. Consent - Education Student/Services

C. Consent - Personnel Services

D. Consent Items - Policy Development

E. Consent items listed under A through D are considered routine and will be approved/adopted by a single motion.

M. Humphrey made a motion to Bill Hall.
L. Alvarado seconded the motion.
The board **VOTED** unanimously to approve the motion.

VII. Business/Financial Services

A.

Approval of Niche Premium Partnership Service Agreement for the 2023-24 School Year

S. Houle made a motion to Bill Hall.
S. Fraire seconded the motion.
The board **VOTED** unanimously to approve the motion.

B. Approval of SeaStone Productions Agreement

S. Fraire made a motion to Bill Hall.
S. Houle seconded the motion.
The board **VOTED** unanimously to approve the motion.

C. Approval of Excel Academy Charter Schools Tax Form 990 Return and California Tax Form 199 Return (Draft) - Year Ended June 30, 2022, as prepared by CliftonLarsonAllen (CLA)

S. Fraire made a motion to Bill Hall.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

D. Ratification of the Additional Chromebooks Purchase

E. Approval of APLUS+ Membership for 2023-24 (Renewal)

S. Houle made a motion to Bill Hall.
S. Fraire seconded the motion.
The board **VOTED** unanimously to approve the motion.

F. Approval of California Charter Schools Association (CCSA) Membership for 2023-24 (Renewal)

S. Fraire made a motion to Bill Hall.
S. Houle seconded the motion.
The board **VOTED** unanimously to approve the motion.

G. Approval of the EACS Ordering Purchase System (OPS) (Renewal)

S. Houle made a motion to Bill Hall.
L. Alvarado seconded the motion.
The board **VOTED** unanimously to approve the motion.

H. Approval of Sage Intacct Accounting Service Contract (Renewal)

M. Humphrey made a motion to Bill Hall.
S. Houle seconded the motion.
The board **VOTED** unanimously to approve the motion.

I.

Approval of the Stampli Contract (Renewal)

S. Fraire made a motion to Bill Hall.
L. Alvarado seconded the motion.
The board **VOTED** unanimously to approve the motion.

VIII. Education Services

A. Approval of the CLASS for Zoom Subscription for the 2023-24 School Year

S. Houle made a motion to Bill Hall.
L. Alvarado seconded the motion.
The board **VOTED** unanimously to approve the motion.

B. Approval of Bright Thinker Service Licenses (Renewal)

S. Fraire made a motion to Bill Hall.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

C. Approval of FlexPoint Education Cloud Agreement (Renewal)

S. Houle made a motion to Bill Hall.
S. Fraire seconded the motion.
The board **VOTED** unanimously to approve the motion.

D. Approval of the Disney CodeIllusion Subscription (Renewal)

S. Fraire made a motion to Bill Hall.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

E. Approval of the Studies Weekly Subscription (Renewal)

S. Fraire made a motion to Bill Hall.
L. Alvarado seconded the motion.
The board **VOTED** unanimously to approve the motion.

F. Approval of the Tutor.com Subscription (Renewal)

S. Houle made a motion to Bill Hall.
S. Fraire seconded the motion.
The board **VOTED** unanimously to approve the motion.

G. Approval of the Goalbook Subscription (Renewal)

S. Fraire made a motion to Bill Hall.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

H. Approval of the Presence Learning Agreement (Renewal)

L. Alvarado made a motion to Bill Hall.
S. Fraire seconded the motion.
The board **VOTED** unanimously to approve the motion.

I. Approval of the Imagine Language & Literacy Subscription (Renewal)

S. Houle made a motion to Bill Hall.
S. Fraire seconded the motion.
The board **VOTED** unanimously to approve the motion.

J. Approval of the Care Solace Service (Renewal)

S. Houle made a motion to Bill Hall.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

IX. Personnel Services

A. Approval of Revisions to the Executive Director/CEO Contract

S. Fraire made a motion to Bill Hall.
M. Humphrey seconded the motion.
The board **VOTED** unanimously to approve the motion.

B. Approval of the Revisions to the Executive Director/CEO Job Description

S. Fraire made a motion to Bill Hall.
L. Alvarado seconded the motion.
The board **VOTED** unanimously to approve the motion.

C. Approval of the Declaration of Need (DON) for Fully Qualified Educators

M. Humphrey made a motion to Bill Hall.
L. Alvarado seconded the motion.
The board **VOTED** unanimously to approve the motion.

X. Comments

A. Board Comments

The Board commended the team for doing their job in vetting what is needed for the school. They appreciated having the principals in attendance and commented how it was such a joy to be a part of the process. The Board thanked Heidi and the staff for their work and commented how the CDS award reflects on the job done well. They appreciate being in person for these meetings, and the positivity. They commended the Board President for his work and keeping the team on time. They pass thanks onto the whole school.

B. CEO Comments

Heidi thanks the board for their belief in her and the recognition of the work that goes into these meetings.

XI. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 12:43 PM.

Respectfully Submitted,
W. Hall

FOR MORE INFORMATION
For more information concerning this agenda, contact
Excel Academy Charter School.

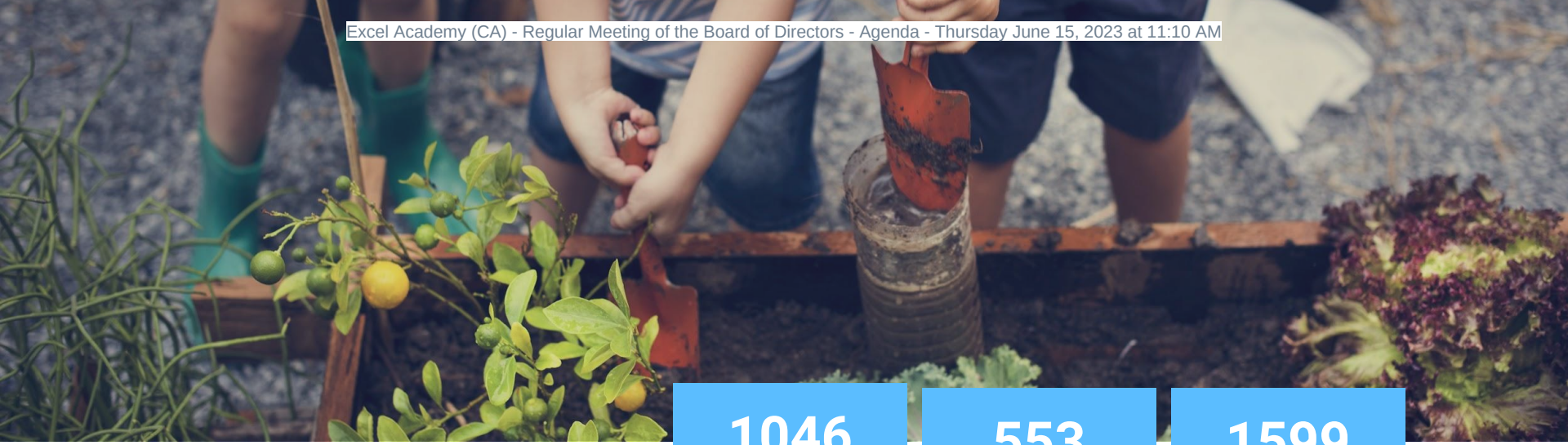
Coversheet

School Highlights - Presented by Heidi Gasca, Executive Director/CEO

Section:	X. Correspondence/Proposals/Reports
Item:	A. School Highlights - Presented by Heidi Gasca, Executive Director/CEO
Purpose:	Discuss
Submitted by:	
Related Material:	May 2023 Board Update.pdf

EXCEL ACADEMY

May School Highlights



Enrollment

Warner	Helendale	Total
1046	553	1599

225

New applications for the 2023-24 School Year

Excel Warner: 149

Excel Helendale: 76

EACS' The Little Mermaid

Excel's First Prom!

Board Governance Highlights

JUNE 2023

EXCEL ACADEMY
A TK-12 Public Charter School

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
			1	2	3	4
5	6	7 EACS Graduation	8 Admin Brunch	9 Last day of school	10	11
12	13	14 Staff Celebration	15 EACS Board Meeting	16	17	18
19	20	21	22 EACS Board Meeting	23	24	25
26	27	28	29	30	31	

CONGRATS, GRADS!

- 60 out of 61 seniors are graduating with the Golden State Seal Merit Diploma
- 12 have been inducted into the National Honor Society
- 8 Special Education students are graduating with diplomas
- 5 are receiving the President's Award for Educational Excellence, and 5 are receiving the President's Award for Educational Achievement

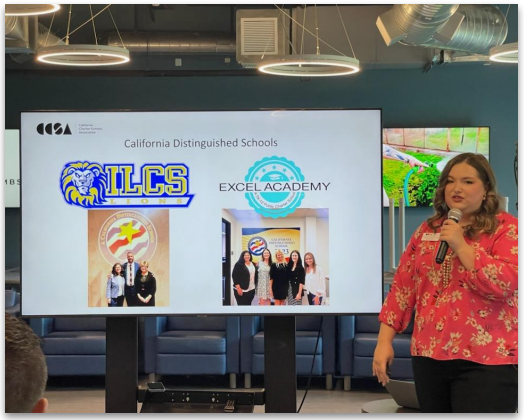
BOARD MEMBER RESOURCES & UPDATES

- **No July Board Meeting for EACS**

Board Meetings for the 2023/24 School Year will begin in August.

Program Highlights

- ➔ Staff Performance Reviews held for each employee
- ➔ Held APLUS+ Spring Regional Meeting at the Excel Academy Office



Attended the California Charter School Association (CCSA) events in South Orange County and Fontana

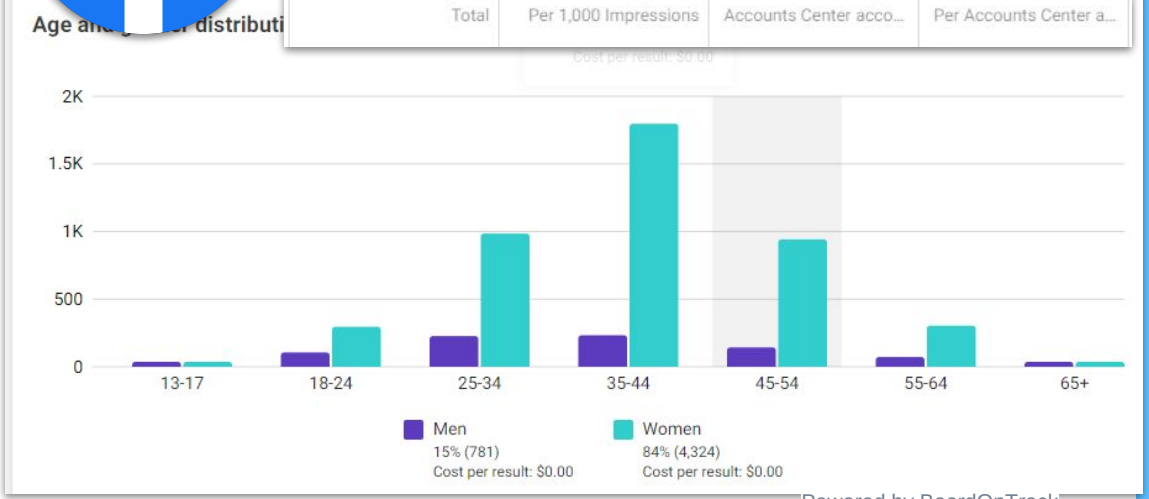
Excel Academy leadership always staying on top of legislative changes in Sacramento!

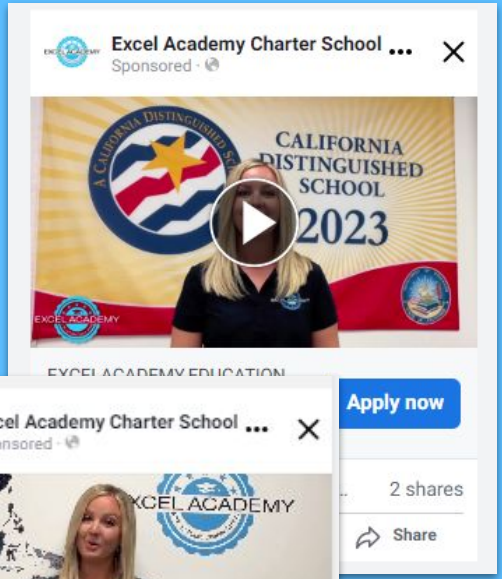
62 Students Graduating

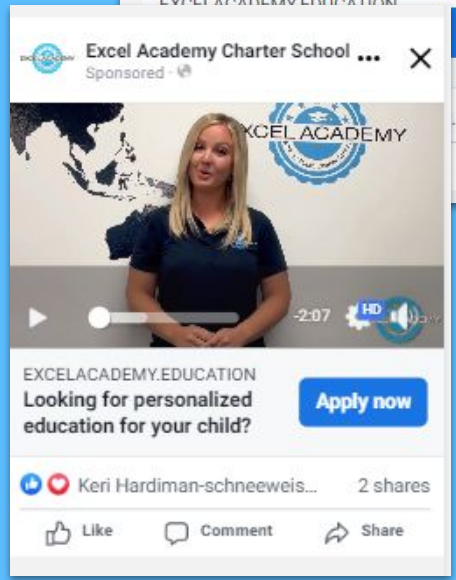
- ★ 2 Valedictorians
- ★ 3 Salutatorians
- ★ 61 receiving the Golden State Seal Merit
- ★ 5 receiving President's Award for Educational Excellence
- ★ 5 receiving President's Award for Educational Achievement
- ★ 12 receiving National Honor Society cords

Social Media Ad Campaign

Impressions	CPM (cost per 1,000 impressions)	Reach	Frequency
5,145	$15.98	3,400	1.51
5,145 Total	**$15.98** Per 1,000 Impressions	**3,400** Accounts Center acco...	**1.51** Per Accounts Center a...

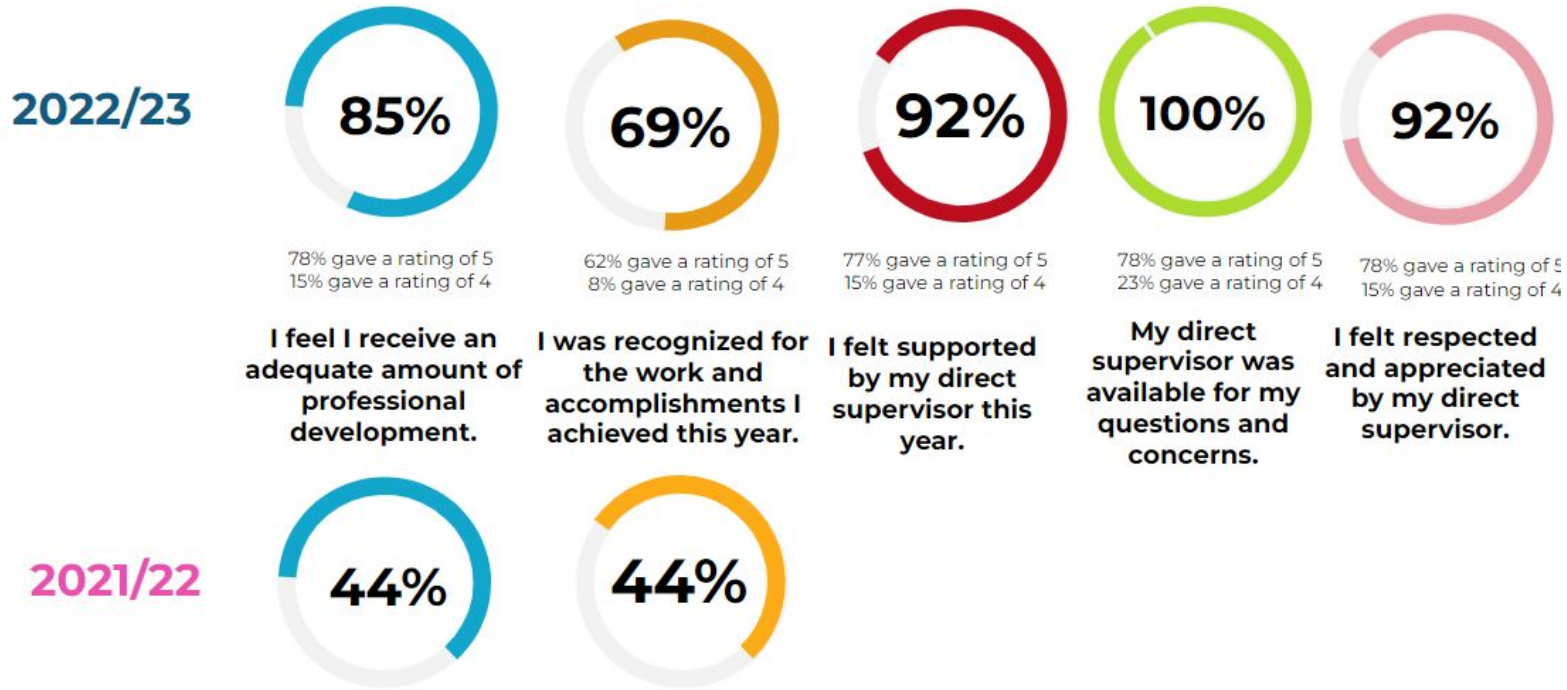






Staff Survey Results: Highlights

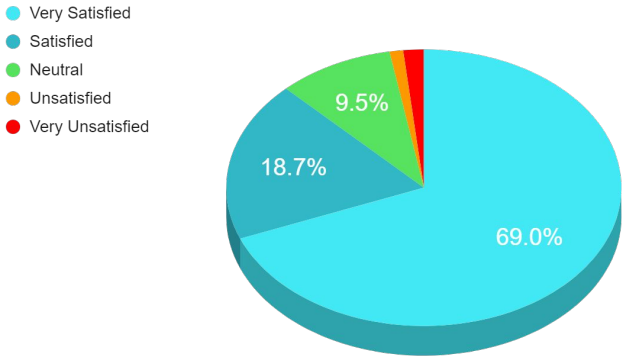
Staff Survey Results: Highlights



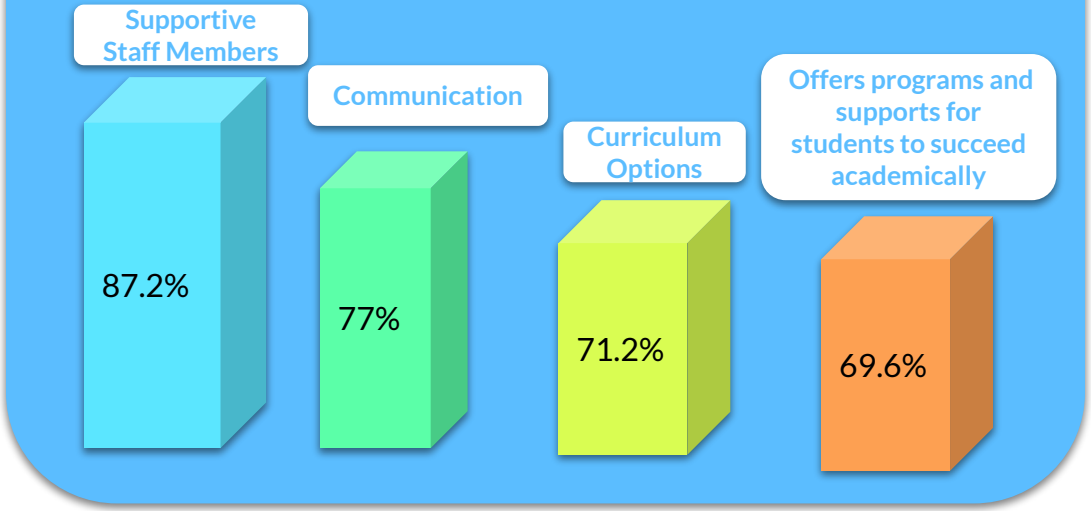
Staff Survey Comments: Highlights

Parent Survey Highlights

"Overall, how satisfied were you with your experience at Excel Academy for the 2022/2023 school year?"

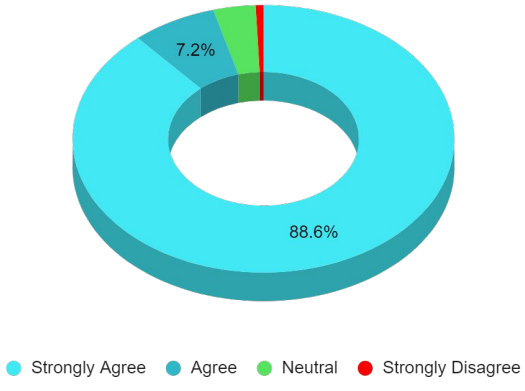


"What does Excel Academy do well as a school?" Top 4 Responses

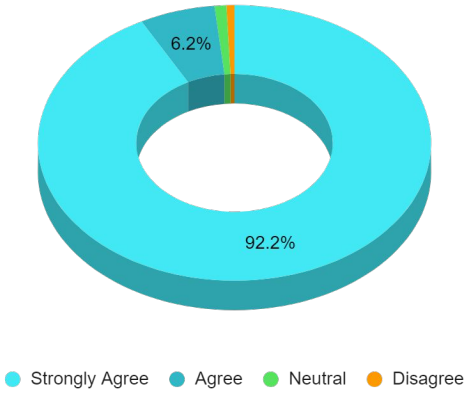


Parent Survey Highlights

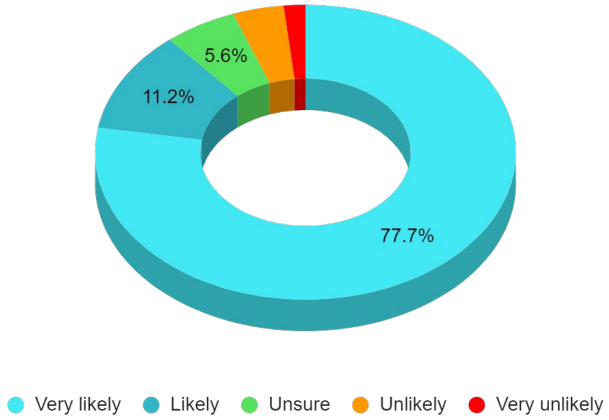
"My Teacher of Record provided helpful suggestions and strategies to improve my student's learning."



"My Teacher of Record communicated effectively with me, informing me of important meetings, deadlines, etc."



"How likely are you to recommend EACS to a family looking for an independent study program?"



Parent Comments:

"I believe we have everything possible with Excel to achieve my children's success in learning and can't think of anything else we may need in order to reach our goals."

"Proud to be part of a California Distinguished School!"

"Special Ed team has been great. I felt like my son was well supported."

"The school worked with our needs while meeting the standards. The communication, support, and overall friendliness was amazing from from our Teacher. We could not have asked for more!"

"We love the homeschooling options, the flexibility, our TOR for all the resources she gives us. As well for all the outdoor classrooms and field trips that enhance the children's learning. We are extremely happy!"

"My ToR is on top of everything and even my teachers at the outsourced classes are on top of my students nothing is slipping through the cracks. All the teachers are very caring and engaged."

"Excel Teachers, and IEP team made our journey with excel a very pleasant experience."

"Excel has continued to maintain a high level of integrity with clear communication and remaining dedicated to being compliant with the state standards and being advocates for the students."

Celebrating 10 Years of Service!

Keri Schneeweiss

Director of Educational Services

Andrea Lowe

Personalized Elementary Teacher

Looking forward to...

June 14, 2023

Thank you!
EXCEL ACADEMY
TK-12 Public Charter School

Coversheet

Consent - Business/Financial Services

Section: XI. Consent
Item: A. Consent - Business/Financial Services
Purpose:
Submitted by:
Related Material: 5.26.23 SM Cash Requirements Statement.pdf
5.26.23 MO Cash Requirements Statement.pdf
5.10.23 Cash Requirements Statement.pdf
CLA Statement of Work - Audit Services.pdf
CLA Governance Communication - Planning-NFP Charter.pdf

BACKGROUND:

Item: Approval of increased agreement with CliftonLarsonAllen (CLA)

Background:

On March 9, 2023, the Board of Directors approved Clifton Larson Allen LLP (CLA) for audit services and preparation of tax returns. The agreed-upon remuneration for these services amounts to a sum of $27,880. It is worth noting that Excel Academy Charter School has forged a longstanding partnership with CLA, benefiting from its exceptional services throughout the years. CLA has consistently demonstrated an impeccable track record, further affirming its proficiency in its industry.

However, owing to the escalating number of public information requests from diverse third-party organizations and the subsequently increased audit requirements, expanding the scope of engagement with CLA has become necessary. Consequently, the staff requests an increase in the agreement in the amount of $6,500. This increase will enable the acquisition of the necessary services to address these supplementary obligations with the utmost diligence and efficacy.

Item: Approval of Hatch & Cesario Agreement for Legal Services

Background: This contract between Excel Academy and Hatch & Cesario will allow for legal services to benefit Excel Academy in any legal matters.

The fiscal impact of Hatch & Cesario’s legal services will be as follows.

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

RECOMMENDATION:

It is recommended that the Board of Directors approve a change order increase in the amount of $6,500 for additional engagement services with Clifton Larson Allen LLP.

Cash Requirements Statement

COMMUNITY COLLABORATIVE CHARTER SCH

Transaction #: C7B4E7B89
Period Ending: 05/15/2023
Check Date: 05/26/2023
PAYCOM Impound Date: 05/26/2023

Client: 0BK94 EIN: 47-4121751

A wire request for $35,126.79 will be sent to your bank on 05/25/2023

Items

Checks / Vouchers	21
Additional Direct Deposit Accounts	1

Billing

Check Processing/Tax Service		579.67
Direct Deposit		7.25
Jurisdiction Filing		42.00
Garnishment Fee this Payroll	No Charge	
Total Billing		628.92

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,545.34	1,545.34	3,090.68
Medicare	486.59	486.59	973.18
Federal W/H Tax	1,679.80		1,679.80
California W/H Next Day	745.50		745.50
California SDI Next Day	304.61		304.61
California ETT Qtrly		2.70	2.70
California SUTA		59.30	59.30
Total Tax Deposits	4,761.84	2,093.93	6,855.77

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	26,142.64
Direct Deposit Distribution - Paycom Pay	1,499.46
Taxes - PAYCOM Resp.	6,855.77
Payroll Fee	628.92
Total Paycom Cash Requirements	35,126.79

Total Cash Requirements

35,126.79

Paycom Payroll, LLC a subsidiary of Paycom Software, Inc.
7501 W. Memorial Road Oklahoma City, OK 73142
(405)722-6900

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Cash Requirements Statement

COMMUNITY COLLABORATIVE CHARTER SCH

Transaction #: 255A98B20
Period Ending: 05/31/2023
Check Date: 05/26/2023

Client: 0BK94 EIN: 47-4121751

PAYCOM Impound Date: 05/26/2023

A wire request for $725,581.99 will be sent to your bank on 05/25/2023

Items

Checks / Vouchers	108
Additional Direct Deposit Accounts	11

Billing

Check Processing/Tax Service	1,656.25
Direct Deposit	9.75
Jurisdiction Filing	42.00
Garnishment Fee this Payroll	10.00
Total Billing	1,718.00

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	4,720.24	4,720.24	9,440.48
Medicare	11,356.35	11,356.35	22,712.70
Federal W/H Tax	60,101.32		60,101.32
California W/H Next Day	28,697.44		28,697.44
California SDI Next Day	6,954.42		6,954.42
California ETT Qtrly		5.75	5.75
California SUTA		126.68	126.68
Hawaii W/H Semiweekly	775.22		775.22
Hawaii SUTA		223.27	223.27
Total Tax Deposits	112,604.99	16,432.29	129,037.28

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	569,564.64
Direct Deposit Distribution - Paycom Pay	25,262.07
Taxes - PAYCOM Resp.	129,037.28
Payroll Fee	1,718.00
Total Paycom Cash Requirements	725,581.99

Total Cash Requirements

725,581.99

Paycom Payroll, LLC a subsidiary of Paycom Software, Inc.
7501 W. Memorial Road Oklahoma City, OK 73142
(405)722-6900

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Cash Requirements Statement

COMMUNITY COLLABORATIVE CHARTER SCH

Transaction #: 8942C6BEA
Period Ending: 04/30/2023
Check Date: 05/10/2023
PAYCOM Impound Date: 05/10/2023

Client: 0BK94 EIN: 47-4121751

A wire request for $32,713.09 will be sent to your bank on 05/09/2023

Items

Checks / Vouchers	21
Additional Direct Deposit Accounts	0

Billing

Check Processing/Tax Service		578.68
Multi-State Filing		42.00
Garnishment Fee this Payroll	No Charge	
Total Billing		620.68

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,398.18	1,398.18	2,796.36
Medicare	453.46	453.46	906.92
Federal W/H Tax	1,380.84		1,380.84
California W/H Next Day	607.98		607.98
California SDI Next Day	283.94		283.94
California ETT Qtrly		2.82	2.82
California SUTA		62.15	62.15
Total Tax Deposits	4,124.40	1,916.61	6,041.01

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	26,051.40
Taxes - PAYCOM Resp.	6,041.01
Payroll Fee	620.68
Total Paycom Cash Requirements	32,713.09

Total Cash Requirements

32,713.09

Paycom Payroll, LLC a subsidiary of Paycom Software, Inc.
7501 W. Memorial Road Oklahoma City, OK 73142
(405)722-6900

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CliftonLarsonAllen LLP
https://www.claconnect.com

Statement of Work - Audit Services

February 14, 2023

This document constitutes a statement of work ("SOW") under the master service agreement ("MSA") dated September 12, 2022, or superseding MSA, made by and between CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") and Excel Academy Charter Schools ("you," "your," or "the entity"). We are pleased to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services CLA will provide for the entity as of and for the year ended June 30, 2023.

Lili Huang is responsible for the performance of the audit engagement. Per Education Code Section 41020(f)(2), there is a limit of six consecutive years for any firm where the principal of the audit and the reviewing principal have been the same in each of those years. This is the third consecutive year Lili Huang will be the engagement principal.

Scope of audit services
We will audit the financial statements of Excel Academy Charter Schools, which comprise the financial statements identified below, and the related notes to the financial statements (collectively, the “financial statements”).

The statement of financial position as of June 30, 2023, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

We will also evaluate and report on the presentation of the following supplementary information accompanying the financial statements in relation to the financial statements as a whole:

Schedule of Expenditures of Federal Awards
Schedule of Instructional Time
Schedule of Average Daily Attendance
Reconciliation of Annual Financial Report With Audited Financial Statements

The following supplementary information accompanying the financial statements will not be subjected to the auditing procedures applied in our audit of the financial statements and our auditors' report will not provide an opinion or any assurance on that information:

Local Education Agency Organization Structure

Nonaudit services

We will also provide the following nonaudit services:

· Preparation of your financial statements and the related notes.

· Preparation of the supplementary information.

· Preparation of adjusting journal entries, as needed.

· Preparation of the Data Collection Form.

· Preparation of the informational tax returns.

Audit objectives

The objectives of our audit of the financial statements are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America (U.S. GAAP). Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS) will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

Our audit will be conducted in accordance with U.S. GAAS; the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance) and the *2022-2023 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel. Those standards require us to be independent of the entity and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. Our audit will include tests of your accounting records, a determination of major program(s) in accordance with the Uniform Guidance, and other procedures we consider necessary to enable us to express opinions and render the required reports.

We will also perform procedures to enable us to express an opinion on whether the supplementary information (as identified above) accompanying the financial statements is fairly stated, in all material respects, in relation to the financial statements as a whole.

The objectives of our audit also include:

- Reporting on internal control over financial reporting and on compliance with the provisions of laws, regulations, contracts, and award agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards*.

- Reporting on internal control over compliance related to major programs and expressing an opinion (or

disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Uniform Guidance.

- Reporting on compliance related to state programs and expressing an opinion (or disclaimer of opinion) on compliance with the laws and regulations of the state programs in accordance with the requirements of the *2022-2023 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting* .

The *Government Auditing Standards* report on internal control over financial reporting and on compliance and other matters will include a paragraph that states (1) that the purpose of the report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance, and (2) that the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The Uniform Guidance report on internal control over compliance will include a paragraph that states that the purpose of the report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Both reports will state that the report is not suitable for any other purpose.

We will issue written reports upon completion of our audit of your financial statements and compliance with requirements applicable to major programs.

Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinions, add an emphasis-of-matter or other-matter paragraph to our auditors' report, or if necessary, withdraw from the engagement. If our opinions on the financial statements or compliance are other than unmodified, we will discuss the reasons with you in advance. If circumstances occur related to the condition of your records, the availability of sufficient, appropriate audit evidence, or the existence of a significant risk of material misstatement of the financial statements or material noncompliance caused by error, fraudulent financial reporting, or misappropriation of assets, which in our professional judgment prevent us from completing the audit or forming an opinion on the financial statements or an opinion on compliance, we retain the right to take any course of action permitted by professional standards, including declining to express opinions or issue reports, or withdrawing from the engagement.

We also will issue a written report on state compliance upon completion of our audit.

Auditor responsibilities, procedures, and limitations

We will conduct our audit in accordance with U.S. GAAS, the standards for financial audits contained in *Government Auditing Standards*, and the Uniform Guidance.

Those standards require that we exercise professional judgment and maintain professional skepticism throughout the planning and performance of the audit. As part of our audit, we will:

• Identify and assess the risks of material misstatement of the financial statements and material noncompliance, whether due to fraud or error, design and perform audit procedures responsive to those risks, and evaluate whether audit evidence obtained is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement or a material noncompliance resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.

• Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we have identified during the audit.

• Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

• Conclude, based on our evaluation of audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity’s ability to continue as a going concern for a reasonable period of time.

Although our audit planning has not been concluded and modifications may be made, we have identified the following significant risk(s) of material misstatement as part of our audit planning:

• Override of Management Controls

• Revenue Recognition

There is an unavoidable risk, because of the inherent limitations of an audit, together with the inherent limitations of internal control, that some material misstatements or noncompliance may not be detected, even though the audit is properly planned and performed in accordance with U.S. GAAS, Government Auditing Standards, and the Uniform Guidance. Because we will not perform a detailed examination of all transactions, material misstatements, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity, may not be detected. Because the determination of waste and abuse is subjective, Government Auditing Standards do not require auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements or on major programs. However, we will inform the appropriate level of management and those charged with governance of any material errors, fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management and those charged with

governance of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. We will include such matters in the reports required for a single audit.

Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting fraud or errors that are material to the financial statements and to preventing and detecting misstatements resulting from noncompliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

As required by the Uniform Guidance, we will perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with compliance requirements applicable to each major program. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.

An audit is not designed to provide assurance on internal control or to identify deficiencies, significant deficiencies, or material weaknesses in internal control. However, we will communicate to you in writing significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under AICPA professional standards, Government Auditing Standards, and the Uniform Guidance.

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the entity's compliance with the provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to Government Auditing Standards.

We will include in our report on internal control over financial reporting and on compliance relevant information about any identified or suspected instances of fraud and any identified or suspected noncompliance with provisions of laws, regulations, contracts, or grant agreements that may have occurred that are required to be communicated under Government Auditing Standards.

The Uniform Guidance requires that we also plan and perform the audit to obtain reasonable assurance about whether the auditee has complied with federal statutes, regulations, and the terms and conditions of federal awards that may have a direct and material effect on each of the entity's major programs. Our procedures will consist of tests of transactions and other applicable procedures described in the "OMB Compliance Supplement" for the types of compliance requirements that could have a direct and material effect on each of the entity's major programs. The purpose of these procedures will be to express an opinion on the entity's compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance.

We will evaluate the presentation of the schedule of expenditures of federal awards accompanying the financial statements in relation to the financial statements as a whole. We will make certain inquiries of management and evaluate the form, content, and methods of preparing the schedule to determine whether

the information complies with U.S. GAAP and the Uniform Guidance, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the financial statements. We will compare and reconcile the schedule to the underlying accounting records and other records used to prepare the financial statements or to the financial statements themselves.

Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Management responsibilities

Our audit will be conducted on the basis that you (management and, when appropriate, those charged with governance) acknowledge and understand that you have certain responsibilities that are fundamental to the conduct of an audit.

You are responsible for the preparation and fair presentation of the financial statements and the schedule of expenditures of federal awards in accordance with U.S. GAAP. Management is also responsible for identifying all federal awards received, understanding and complying with the compliance requirements, and for the preparation of the schedule of expenditures of federal awards (including notes and noncash assistance received) in accordance with the requirements of the Uniform Guidance.

Management's responsibilities include the selection and application of accounting principles; recording and reflecting all transactions in the financial statements; determining the reasonableness of significant accounting estimates included in the financial statements; adjusting the financial statements to correct material misstatements; and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole. In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for one year after the date the financial statements are available to be issued.

Management is responsible for compliance with applicable laws and regulations and the provisions of contracts and grant agreements, including compliance with federal statutes, regulations, and the terms and conditions of federal awards applicable to the entity's federal programs. Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for program compliance and for the accuracy and completeness of that information.

You are responsible for the design, implementation, and maintenance of effective internal control, including internal control over compliance, relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, including evaluating and monitoring ongoing activities and safeguarding assets to help ensure that appropriate goals and objectives are met; and that there is reasonable assurance that government programs are administered in compliance with compliance requirements.

You are responsible for the design, implementation, and maintenance of internal controls to prevent and detect fraud; assessing the risk that the financial statements may be materially misstated as a result of

fraud; and for informing us about all known or suspected fraud affecting the entity involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the entity received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for implementing systems designed to achieve compliance with applicable laws and regulations and the provisions of contracts and grant agreements, including compliance with federal statutes, regulations, and the terms and conditions of federal awards applicable to the entity's federal programs; identifying and ensuring that the entity complies with applicable laws, regulations, contracts, and grant agreements, including compliance with federal statutes, regulations, and the terms and conditions of federal awards applicable to the entity's federal programs; and informing us of all instances of identified or suspected noncompliance whose effects on the financial statements should be considered.

You are responsible for taking timely and appropriate steps to remedy any fraud; noncompliance with provisions of laws, regulations, contracts, or grant agreements; or abuse that we may report. Additionally, as required by the Uniform Guidance, it is management's responsibility to evaluate and monitor noncompliance with federal statutes, regulations, and the terms and conditions of federal awards; take prompt action when instances of noncompliance are identified, including noncompliance identified in audit findings; and to follow up and take prompt corrective action on reported audit findings and to prepare a summary schedule of prior audit findings and a corrective action plan. The summary schedule of prior audit findings should be available for our review.

You are responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, including amounts and disclosures, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters, and for the accuracy and completeness of that information (including information from within and outside of the general and subsidiary ledgers), and for ensuring management information and financial information is reliable and properly reported; (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the Uniform Guidance; (3) additional information that we may request for the purpose of the audit; and (4) unrestricted access to persons within the entity from whom we determine it necessary to obtain audit evidence.

You agree to inform us of events occurring or facts discovered subsequent to the date of the financial statements that may affect the financial statements.

You agree to include our report on the schedule of expenditures of federal awards in any document that contains and indicates that we have reported on the schedule of expenditures of federal awards. You also agree to include the audited financial statements with any presentation of the schedule of expenditures of federal awards that includes our report thereon or make the audited financial statements readily available to intended users of the schedule of expenditures of federal awards no later than the date the schedule of expenditures of federal awards is issued with our report thereon. Your responsibilities include acknowledging to us in the representation letter that (1) you are responsible for presentation of the schedule of expenditures of federal awards in accordance with the Uniform Guidance; (2) you believe the

schedule of expenditures of federal awards, including its form and content, is fairly presented in accordance with the Uniform Guidance; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the schedule of expenditures of federal awards.

Management is responsible for the preparation and fair presentation of other supplementary information in accordance with U.S. GAAP. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon or make the audited financial statements readily available to users of the supplementary information no later than the date the supplementary information is issued with our report thereon. You agree to provide us written representations related to the presentation of the supplementary information.

Management is responsible for providing us with a written confirmation concerning representations made by you and your staff to us in connection with the audit. During our engagement, we will request information and explanations from you regarding, among other matters, the entity's operations, internal control, future plans, specific transactions, and accounting systems and procedures. The procedures we will perform during our engagement and the conclusions we reach as a basis for our report will be heavily influenced by the representations that we receive in the representation letter and otherwise from you. Accordingly, inaccurate, incomplete, or false representations could cause us to expend unnecessary effort or could cause a material fraud or error to go undetected by our procedures. In view of the foregoing, you agree that we shall not be responsible for any misstatements in the entity's financial statements that we may fail to detect as a result of misrepresentations made to us by you.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies to us of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the "Audit objectives" section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other engagements or studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

Responsibilities and limitations related to nonaudit services

For all nonaudit services we may provide to you, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services; and accept responsibility for the results of the services. Management is also responsible for ensuring that your data and records are complete and that you have received sufficient information to oversee the services.

Use of financial statements

Should you decide to include or incorporate by reference these financial statements and our auditors' report(s) thereon in a future private placement or other offering of equity or debt securities, you agree that we are under no obligation to re-issue our report or provide consent for the use of our report in such a registration or offering document. We will determine, at our sole discretion, whether we will re-issue our report or provide consent for the use of our report only after we have performed the procedures we consider necessary in the circumstances. If we decide to re-issue our report or consent to the use of our report, we will be required to perform certain procedures including, but not limited to, (a) reading other information incorporated by reference in the registration statement or other offering document and (b) subsequent event procedures. These procedures will be considered an engagement separate and distinct from our audit engagement, and we will bill you separately. If we decide to re-issue our report or consent to the use of our report, you agree that we will be included on each distribution of draft offering materials and we will receive a complete set of final documents. If we decide not to re-issue our report or decide to withhold our consent to the use of our report, you may be required to engage another firm to audit periods covered by our audit reports, and that firm will likely bill you for its services. While the successor auditor may request access to our workpapers for those periods, we are under no obligation to permit such access.

If the parties (i.e., you and CLA) agree that CLA will not be involved with your official statements related to municipal securities filings or other offering documents, we will require that any official statements or other offering documents issued by you with which we are not involved clearly indicate that CLA is not involved with the contents of such documents. Such disclosure should read as follows:

> CliftonLarsonAllen LLP, our independent auditor, has not been engaged to perform and has not performed, since the date of its report included herein, any procedures on the financial statements addressed in that report. CliftonLarsonAllen LLP also has not performed any procedures relating to this offering document.

With regard to the electronic dissemination of audited financial statements, including financial statements published electronically on your website or submitted on a regulator website, you understand that electronic sites are a means to distribute information and, therefore, we are not required to read the information contained in those sites or to consider the consistency of other information in the electronic site with the original document.

We may issue preliminary draft financial statements to you for your review. Any preliminary draft financial statements should not be relied on or distributed.

Engagement administration and other matters

We expect to begin our audit on approximately May 1, 2023.

We understand that your employees will prepare all confirmations, account analyses, and audit schedules we request and will locate any documents or invoices selected by us for testing. A list of information we expect to need for our audit and the dates required will be provided in a separate communication.

At the conclusion of the engagement, we will complete the auditor sections of the electronic Data Collection Form SF-SAC and perform the steps to certify the Form SF-SAC and single audit reporting package. It is

management's responsibility to complete the auditee sections of the Data Collection Form. We will create the single audit reporting package PDF file for submission; however, it is management's responsibility to review for completeness and accuracy and electronically submit the reporting package (including financial statements, schedule of expenditures of federal awards, summary schedule of prior audit findings, auditors' reports, and corrective action plan) along with the Data Collection Form to the federal audit clearinghouse and, if appropriate, to pass-through entities. The Data Collection Form and the reporting package must be electronically submitted within the earlier of 30 calendar days after receipt of the auditors' reports or nine months after the end of the audit period.

We will provide copies of our reports to the entity; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing confidential or sensitive information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the sole and exclusive property of CLA and constitutes confidential and proprietary information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to California Department of Education, California State Controllers Office, and authorizer(s), or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of CLA personnel. Furthermore, upon request, we may provide copies or electronic versions of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of seven years after the report release date or for any additional period requested by the California Department of Education, California State Controllers Office, and authorizer(s). If we are aware that a federal or state awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Professional standards require us to be independent with respect to you in the performance of these services. Any discussion that you have with our personnel regarding potential employment with you could impair our independence with respect to this engagement. Therefore, we request that you inform us prior to any such discussions so that we can implement appropriate safeguards to maintain our independence and objectivity. Further, any employment offers to any staff members working on this engagement without our prior knowledge may require substantial additional procedures to ensure our independence. You will be responsible for any additional costs incurred to perform these procedures.

Our audit engagement ends on delivery of our signed report. Any additional services that might be requested will be a separate, new engagement. The terms and conditions of that new engagement will be governed by a new, specific SOW for that service.

Government Auditing Standards require that we make our most recent external peer review report publicly available. The report is posted on our website at www.CLAconnect.com/Aboutus/.

Fees

Our professional fees are detailed in the table below. We will also bill for expenses (including travel, internal and administrative charges) plus a technology and client support fee of five percent (5%) of all professional fees billed. This estimate is based on anticipated cooperation from your personnel and their assistance with locating requested documents and preparing requested schedules. If the requested items are not available on the dates required or are not accurate, the fees and expenses will likely be higher. Our invoices, including applicable state and local taxes, will be rendered each month as work progresses and are payable on presentation. There is a ten percent withholding clause per Education Code 14505. **Service**

Service	Professional Fee
Audit services, includes procedures for one major federal program (if additional programs are required to be tested they will be billed at $6,500 per additional program)	$22,000
Data Collection Form SF-FAC and single audit reporting package	$1,050
Informational tax returns	$3,500
Technology and client support fee	$1,330
Total	$27,880

Additional state compliance procedures related to changes to the *2022-2023 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel will be billed as out-of-scope.

Unexpected circumstances

We will advise you if unexpected circumstances require significant additional procedures resulting in a substantial increase in the fee estimate.

Changes in accounting and audit standards

Standard setters and regulators continue to evaluate and modify standards. Such changes may result in new or revised financial reporting and disclosure requirements or expand the nature, timing, and scope of the activities we are required to perform. To the extent that the amount of time required to provide the services described in the SOW increases due to such changes, our fee may need to be adjusted. We will discuss such circumstances with you prior to performing the additional work.

Agreement

We appreciate the opportunity to provide to you the services described in this SOW under the MSA and believe this SOW accurately summarizes the significant terms of our audit engagement. This SOW and the MSA constitute the entire agreement regarding these services and supersedes all prior agreements (whether oral or written), understandings, negotiations, and discussions between you and CLA related to audit

services. If you have any questions, please let us know. Please sign, date, and return this SOW to us to indicate your acknowledgment and understanding of, and agreement with, the arrangements for our audit of your financial statements including the terms of our engagement and the parties' respective responsibilities.

Sincerely,

CliftonLarsonAllen LLP

Response:
This letter correctly sets forth the understanding of Excel Academy Charter Schools.

CLA
CLA

Lili Huang, Principal

Client
Excel Academy Charter Schools

SIGN:

Heidi Gasca, Executive Director

DATE:

CliftonLarsonAllen LLP
2210 East Route 66
Glendora, CA 91740

phone 626.857.7300 **fax** 626.857.7302
CLAconnect.com

May 8, 2023

To the Board and Management of
Excel Academy Charter Schools

We are engaged to audit the financial statements of Excel Academy Charter Schools as of and for the year ended June 30, 2023. Professional standards require that we communicate to you the following information related to our audit. We will contact you to schedule a meeting to discuss this information since a two-way dialogue can provide valuable information for the audit process. We ask if you have any questions or need clarification to any of email the following: Wade.McMullen@claconnect.com, Derrick.Debruyne@claconnect.com, Lili.Huang@claconnect.com, Marlen.Gomez@claconnect.com.

Timelines and Deadlines

Audit reports must be filed with the CDE, the State Controller's Office (SCO), the local County Superintendent of Schools, and, if applicable, the chartering entity, by **December 15** of each year.

We request that basic financial information **(trial balance and general ledger as of June 30, 2023 and general ledger for the next fiscal year)** be transmitted to us no later than **October 1**.

In order to file the report on or before the December 15 state deadline, **all audit information requests made prior to October 25 should be received no later than October 31**. This will allow us the time needed to complete the audit and submit our working-papers to our national assurance quality control team.

If a *significant amount* of the audit information requests are not received by the specified date, we will send a letter to Board and Management specifying the extent of outstanding information and possibly recommend notifying Excel Academy Charter Schools's authorizer that an audit report filing extension to **January 31** is needed. The decision to apply for this extension is solely the responsibility of Excel Academy Charter Schools's Board and Management.

Our responsibility under Auditing Standards Generally Accepted in the United States of America and *Government Auditing Standards*

Financial statements, internal control, and compliance

We will conduct our audit in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS) and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require us to be independent of the entity and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit.

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Those standards also require that we exercise professional judgment and maintain professional skepticism throughout the planning and performance of the audit. As part of our audit, we will:

- Identify and assess the risks of material misstatement of the financial statements and material noncompliance, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinions. The risk of not detecting a material misstatement or a material noncompliance resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.

- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under U.S. GAAS and *Government Auditing Standards*.

- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

- Conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity’s ability to continue as a going concern for a reasonable period of time.

- Form and express an opinion about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America.

- Plan and perform the audit to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

- Perform, as part of obtaining reasonable assurance about whether the financial statements as a whole are free from material misstatement, tests of the entity’s compliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. However, the objective of our tests is not to provide an opinion on compliance with such provisions and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

- Provide a report (which does not include an opinion) on internal control over financial reporting and on compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements, as required by *Government Auditing Standards*.

- Communicate significant matters related to the financial statement audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures specifically to identify such matters.

- Communicate circumstances that affect the form and content of the auditors' report.

- Communicating any matters relevant to compliance with the *California State K-12 Audit Guide*.

Our responsibility under Auditing Standards Generally Accepted in the United States of America, *Government Auditing Standards,* and Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*

Financial statements, internal control, and compliance

If it is determined that Excel Academy Charter Schools has expended more than $750,000 in federal funds during the course of the year being audited, the additional following responsibilities apply:

We will conduct our audit in accordance with auditing standards generally accepted in the United States of America (U.S. GAAS); the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). In addition to the Auditing Standards Generally Accepted in the United States of America and *Government Auditing Standards*, we will:

- Obtain an understanding of internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control over compliance. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control over compliance that we identify during the audit that are required to be communicated.

- Plan and perform the audit to obtain reasonable assurance about whether material noncompliance with the applicable compliance requirements occurred. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with U.S. GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. Material noncompliance can arise from fraud or error and is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report.

- Perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with the direct and material compliance requirements applicable to each major federal award program. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.

- Consider internal control over compliance with requirements that could have a direct and material effect on a major federal program in order to determine our auditing procedures for the purpose of expressing our opinion on compliance and to test and report on internal control over compliance in accordance with the Uniform Guidance.

- Perform tests of transactions and other applicable procedures described in the “OMB Compliance Supplement” for the types of compliance requirements that could have a direct and material effect on each of the entity’s major programs. The purpose of these procedures will be to express an opinion on the entity’s compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance. While our audit will provide a reasonable basis for our opinion, it will not provide a legal determination on the entity’s compliance with those requirements.

- Provide a report on internal control over compliance related to major programs and express an opinion (or disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Uniform Guidance.

- Our responsibility for the schedule of expenditures of federal awards (SEFA) accompanying the financial statements, as described by professional standards, is to evaluate the presentation of the SEFA in relation to the financial statements as a whole and to report on whether the SEFA is fairly stated, in all material respects, in relation to the financial statements as a whole. We will make certain inquiries of management and evaluate the form, content, and methods of preparing the SEFA to determine whether the SEFA complies with the requirements of the Uniform Guidance, the method of preparing it has not changed from the prior period, and the SEFA is appropriate and complete in relation to our audit of the financial statements. We will compare and reconcile the SEFA to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

Our audit of the financial statements does not relieve you or management of your responsibilities.

We gave significant consideration to assisting management with the preparation of the financial statements to be provided, which may reasonably be thought to bear on independence, in reaching the conclusion that independence has not been impaired.

Supplementary information in relation to the financial statements as a whole

Because we were engaged to report on the supplementary information accompanying the financial statements, our responsibility for other supplementary information accompanying the financial statements, as described by professional standards, is to evaluate the presentation of the supplementary information in relation to the financial statements as a whole and to report on whether the supplementary information is fairly stated, in all material respects, in relation to the financial statements as a whole. We will make certain inquiries of management and evaluate the form, content, and methods of preparing the information to determine whether the information complies with accounting principles generally accepted in the United States of America, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the financial statements. We will compare and reconcile the supplementary information to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

Planned scope and timing of the audit

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested.

Our audit of the financial statements will include obtaining an understanding of the entity and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Material misstatements may result from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the entity or to acts by management or employees acting on behalf of the entity. We will generally communicate our significant findings at the conclusion of the audit. However, some matters may be communicated sooner, particularly if significant difficulties are encountered during the audit where assistance is needed to overcome the difficulties or if the difficulties may lead to a modified opinion. We will also communicate any internal control related matters that are required to be communicated under professional standards.

Although our audit planning has not been concluded and modifications may be made, we have identified the following significant risk(s) of material misstatement as part of our audit planning:

- Revenue recognition
- Management override of controls

As a result of unexpected events, changes in conditions, or the audit evidence obtained from the results of audit procedures performed, we may need to modify the overall audit strategy and audit plan and, thereby, the resulting planned nature, timing, and extent of further audit procedures, based on the revised consideration of assessed risks.

We expect to begin our audit in the Spring of 2023 and issue our report no later than December 15.

Other planning matters

Recognizing the importance of two-way communication, we encourage you to provide us with information you consider relevant to the audit. This may include, but is not limited to, the following items:

- Your views about the following matters:
    - The appropriate person(s) in the entity's governance structure with whom we should communicate.
    - The allocation of responsibilities between those charged with governance and management.
    - The entity's objectives and strategies and the related business risks that may result in material misstatements.
    - Matters you believe warrant particular attention during the audit and any areas for which you request additional procedures to be undertaken.
    - Significant communications between the entity and regulators.
    - Other matters you believe are relevant to the audit of the financial statements.
- The attitudes, awareness, and actions of those charged with governance concerning (a) the entity's internal control and its importance in the entity, including how those charged with governance oversee the effectiveness of internal control, and (b) the detection or the possibility of fraud.
- The actions of those charged with governance in response to developments in law, accounting standards, corporate governance practices, and other related matters, and the effects of such developments on, for example, the overall presentation, structure, and content of the financial statements, including the following:
    - The relevance, reliability, comparability, and understandability of the information presented in the financial statements.
    - Whether all required information has been included in the financial statements, and whether such information has been appropriately classified, aggregated or disaggregated, and presented.
- The actions of those charged with governance in response to previous communications with the auditor.
- Your understanding of the risks of fraud and the controls in place to prevent and detect fraud, including your views on the following matters:
    - The “tone at the top” conveyed by management.
    - The risk that the entity’s financial statements or schedule of expenditures of federal awards might be materially misstated due to fraud.

  - Programs and controls that the entity has established to mitigate identified fraud risks or that otherwise help to prevent, deter, and detect fraud.
  - How and how often you review the entity's policies on fraud prevention and detection.
  - If a fraud hotline is in place, how it is monitored and how you are notified of allegations or concerns.
  - How you exercise oversight of management's processes for identifying and responding to the risks of fraud and the programs and controls management has established to mitigate those risks.
  - The risks of fraud at the entity, including any specific fraud risks the entity has identified or account balances, classes of transactions, or disclosures for which a risk of fraud may be likely to exist.
  - Examples of fraud-related discussions management has had with you.
  - Any actual or suspected fraud affecting the entity or its federal award programs that you are aware of, including measures taken to address the fraud.
  - Any allegations of fraud or suspected fraud (e.g., received in communications from employees, former employees, grantors, regulators, or others) that you are aware of.
  - Any knowledge of possible or actual policy violations or abuses of broad programs and controls occurring during the period being audited or the subsequent period.
  - Any accounting policies or procedures applied to smooth earnings, meet debt covenants, minimize taxes, or achieve budget, bonus, or other financial targets that you are aware of; and whether you are aware of any accounting policies that you consider aggressive.

- How you oversee the entity's (1) compliance with laws, regulations, and provisions of contracts and grant agreements, (2) policies relative to the prevention of noncompliance and illegal acts, and (3) use of directives (for example, a code of ethics) and periodic representations obtained from management-level employees about compliance with laws, regulations, and provisions of contracts and grant agreements.
- Whether you are aware of any noncompliance with laws, regulations, contracts, and grant agreements, including measures taken to address the noncompliance.
- If the entity uses a service organization, your knowledge of any fraud, noncompliance, or uncorrected misstatements affecting the entity's financial statements or federal award programs reported by the service organization or otherwise known to you.

* * *

This communication is intended solely for the information and use of the Board of Directors and management of Excel Academy Charter Schools and is not intended to be, and should not be, used by anyone other than these specified parties.

Sincerely,

CliftonLarsonAllen LLP

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Coversheet

Consent - Education Student/Services

Section: XI. Consent
Item: B. Consent - Education Student/Services
Purpose:
Submitted by:
Related Material: Excel Academy 2023-2024 English Learner Master Plan (1).pdf

BACKGROUND:

The English Learner (EL) Master Plan is a document that specifically explains Excel Academy Charter School's goals, vision, testing protocol, and reclassification process for English Learner (EL) students. Core instruction in language arts, math, science and social science is taught in English using charter approved curriculum and SDAIE methodology. EL students receive English Language Development (ELD) instruction which addresses the ELD standards in listening, speaking, reading and writing. EACS students will engage in synchronous and asynchronous instruction. There are no significant changes to the EL Master Plan for the 23-24 school year.

MASTER PLAN
for
ENGLISH LEARNERS
Excel Academy Charter School

Approved by the Excel Academy Charter School Board of Trustees (June 15, 2023)

William Hall, President
Michael Humphrey, Vice President
Susan Houle, Clerk
Steve Fraire, Member
Larry Alvarado, Member

Presented by: Heidi Gasca, Executive Director

EACS EL Master Plan Committee Members:

Jennifer Craig
Tamara Murphy
April Saade
Lara Ulmer

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Mission and Vision
Excel Academy will provide flexible, personalized learning through a customized course of study that will educate, motivate, and instill a love of learning in each individual student. Teachers and parents will join together to maintain high expectations and promote academic excellence for all students creating the next generation of leaders.

Goals and Vision for English Learner Master Plan
Federal case law (Castañeda vs. Pickard, 648F.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.
3. The program successfully produces results that indicate that language barriers are being overcome.

The ultimate goal of the Excel Academy Charter School 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 K–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, the student 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 the student 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 Excel Academy 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 support. 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 beginning to develop (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 are beginning to develop 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/eldstndspublication14.pdf

English Language Mainstream Program
English Learners in Excel Academy 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 Specially Designed Academic Instruction in English (SDAIE) strategies. Students may also be concurrently enrolled in an ELD class to fulfill their designated instructional needs. 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 Excel Academy 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 English Language Development (ELD) instruction which addresses the ELD standards in listening, speaking, reading and writing. EACS students will engage in synchronous and asynchronous instruction.

As a comprehensive approach to ELD, the English Language Arts/English Language Development (ELA/ELD) Framework for California Public Schools states:
"English learners at all English proficiency levels and at all ages require both Integrated ELD and specialized attention to their particular language learning needs, or Designated ELD." (p. 119)

Designated ELD is defined as instruction provided during a time during the regular school day for focused instruction on the state-adopted ELD standards to assist English learners to develop critical English language skills necessary for academic content learning in English. (California Code of Regulations, Title 5 [5 CCR] Section 11300[a]).

Integrated ELD is defined as instruction in which the state-adopted ELD standards are used in tandem with the state-adopted academic content standards. Integrated ELD includes specifically designed academic instruction in English. (5 CCR Section 11300[c]).

- 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:

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

English Language Development (ELD) Instruction
English Learners in the Excel Academy 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. Excel Academy Charter School will create a personalized pathway of ELD instruction to build skills. 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 through synchronous and asynchronous instruction. 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.

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 Success 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).

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 EL 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/LTELs 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 support to succeed).

- Integration: End the ESL ghetto, cease the sink-or-swim approach, and provide maximum integration without sacrificing access to LTEL support.
- Active engagement: Invite, support, and insist that LTELs become active participants in their own education.

Instructional Support System

Excel Academy 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 Excel Academy Charter School assessment and reporting processes and are 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 Excel Academy 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
Excel Academy Charter School supports each English Learner in his/her 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
Excel Academy 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 CEO 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, Excel Academy 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

Excel Academy 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). Excel Academy 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 they are ready to participate fully in all English instruction without special support services, the student is ready for reclassification.

Reclassification Criteria
Excel Academy 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 his/her ability to communicate with others and its impact on his/her 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 RFEP 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 Administration 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.

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 Excel Academy 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, Excel Academy 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 Excel Academy 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, Excel Academy Charter School is able to determine to what degree English Learners are achieving English proficiency and meeting academic achievement goals.

Excel Academy 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 Excel Academy's Director of Assessment and Accountability. These reports are then analyzed by the Executive Director and other school staff to produce a set of suggested program modifications which are then shared with the local Board of Directors, leads, teachers, and EL parents for additional input and approval.

Excel Academy 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.

Coversheet

Consent - Personnel Services

Section: XI. Consent
Item: C. Consent - Personnel Services
Purpose:
Submitted by:
Related Material: Compliance Coordinator Intervention - 2023_2024.pdf
Virtual ToR Manual - 23_24_VEDU.pdf
Personalized ToR Manual- 23_24.pdf

BACKGROUND:

The Personalized Teacher of Record (ToR) Manual and Virtual Teacher of Record Manual provides an at-a-glance view of each Excel Academy department. This is a quick reference for all ToRs to quickly access and view important department documents. Included in the manual are policies, procedures, and responsibilities for credentialed staff.

Compliance Coordinator
Intervention

Job Description

Department: Education
Reports To: Intervention Coordinator
FLSA Status: Non - Exempt
Job Classification: Certificated
Stipend Pay Range: Additional Assignment Salary Schedule - Tier 5 I - Certificated Oversight $1,000 per month
Work Schedule: 185 days
Position Location: Remote Office

POSITION SUMMARY:

The Intervention Compliance Coordinator (CoCo) is responsible for guiding and supporting compliance initiatives for the Intervention department. CoCo's will ensure students meet requirements of the Intervention department, notify parents, and guide staff through the appropriate submission of PINs. They will also be responsible for periodic data entry and online program support.

QUALIFICATIONS:

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.

Employer Requirements:

- Bachelor's Degree
- Minimum of two (2) years of increasingly responsible experience in either an educational field or event planning.
- Teaching Credential required.

State Requirements:

- 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.
- 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.
- Proof of a clear TB test dated within the last 60 days (Education Code Section 49406) upon employment and thereafter updated every four years.

ESSENTIAL FUNCTIONS AND RESPONSIBILITIES:

- Verify accuracy and completion of the WIN List.
- Ensure the WIN List is accurate after each assessment and as new students are enrolled.
- Review and document WIN and ELD lesson completion in the various programs each week.
- Notify parents if students have not met WIN/ELD requirements and answer basic questions.
- Communicate with the MTSS TOSA and Intervention Coordinator of teachers and students that are not in compliance with the WIN and/or ELD programs.
- Support ToRs with filling out WIN PINs and ensure they are done in a timely fashion.
- Communicate with the Elementary Education Coordinator in regard to AIM meetings
- Periodic data entry and clerical support for the Intervention Department.
- Attend INT Team meetings, as requested.

OTHER DUTIES:

Any an all other duties assigned by the supervisor including but not limited to:

- 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 1 business day.
- Represent the school at community events.
- Maintains professional competence through in-service educational activities provided by the school and other professional growth activities.
- Participates in their WASC focus group and complete assigned WASC related projects/tasks (as needed).

ABILITIES:

- Complies with all Excel Academy Policies and Procedures as outlined in Employee Handbook and all other formal Excel Academy Policy and Procedure documents.
- Travel as required.
- Ability to work overtime as assigned if applicable.
- Proficient in utilizing information databases such as Google, Microsoft Office applications and a variety of web-based applications.

PHYSICAL AND ENVIRONMENTAL 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.

- Sitting or standing for extended periods of time
- Lifting objects up to 50 pounds with or without assistance
- Noise level is generally moderate
- Meetings conducted in public and private settings
- Indoor and outdoor in varying temperatures
- Employee must have available transportation and be able to drive up to 100 miles in a day

---

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

Virtual Teacher

Training Manual

2023-2024 School Year

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Virtual Learning vs Personalized Learning

Excel Academy offers two independent study tracks to choose from. The Virtual ToR oversees students in the Virtual Learning Pathway.

(Grades TK-12) **Personalized Learning Path** The Personalized Learning Path allows students to learn at home under the supervision and guidance of the parent/guardian who directly teaches the student each day. The assigned ToR oversees the learning of the student, meeting with the parent/student at least every 20 school days in order to advise on and assign personalized curriculum content, assess student learning, and ensure the student meets necessary grade level benchmarks. Additionally, regular communication regarding completion of assigned work is necessary to ensure the student is engaged and progressing each day. Instructional Funds are available to purchase curriculum, courses and materials, as well as provide for supplemental learning options like music and art. Student learning in the Personalized Path looks different from one student to another, as they are assigned curricula based on their needs and preferences.

(Grades 1-8) **Virtual Learning Path** The Virtual Learning Path provides daily instruction from a credentialed teacher called a Virtual Teacher of Record (ToR). The Virtual ToR teaches daily lessons from a set grade level curriculum, similar to a traditional brick and mortar setting. Currently, FlexPoint is the main curriculum utilized for all grade levels. Students are loaned a school Chromebook to access daily teaching and the online curriculum. Students also receive instructional funds that can be used for supplemental learning opportunities, as well as school supplies. Because all learning is taught directly to the student by a credentialed teacher, there is less parent involvement required in the Virtual Pathway. However, parents are required to make sure students are on their computer and engaged in the online classroom. They also must ensure student work is turned in by the due date. In order to be able to meet the requirements of the pathway, students must have reliable internet service.

Highlights of Policy or Procedure Changes for 2023/24

Admissions

- **TK enrollment:** The deadline for TK entry has been extended. Students turning 5 years old between September 2- April 2nd may begin TK with Excel at the beginning of the school year. This has changed from December 2nd being the cutoff.
- **Content & Community Providers Acknowledgement Form**: This year, parents will be able to sign this document electronically in their RegOnline! New families completed it during their application process, and returning parents can log back into their RegOnline account to re-sign it for each of their students.

SPED

- When onboarding a new student with an IEP, email both LaKeyshia Ono (lono@excelacademy.education) and Lara Ulmer (lulmer@excelacademy.education) as soon as the MA is signed. There are several time sensitive requirements related to bringing on a student with an active IEP. Please use the subject line "First initial.Last Name MA - New Student" in your email and provide the student's full name, parent's full name, and parent contact information within the body of the email. The special education team will follow-up with required next steps.

Department Highlights

Business Services

NEW! **How to place a Rainbow Resource Punchout Order**

Intervention

WHO to contact for what:

WIN Program	Sarah Horikawa	**WIN & ELD Classes**	Tamara Murphy
WIN Compliance	Sarah Horikawa	**Homeless/Foster Youth**	Tamara Murphy
SST Meetings TK-6	Tamara Murphy	**ELD Program**	Tamara Murphy
SST Meetings 7-12	Alison DeSchaine	**Cultural Awareness**	Tamara Murphy
504 Meetings TK-6	April Saade	**SPED Referrals**	Noell Scott & Tamara Murphy
504 Meetings 7-12	School Counselors	**Acceleration/Retention**	April Saade

WIN Program

- **WIN Program serves 1st-8th grade students (no longer HS)**
- **WIN List: ToRs will no longer enter data directly on the WIN List**. ToRs will fill out a Google Form to report assessment data 2-3 times per year
- **Early Reading (ToR given) assessments:** ToRs will begin with the oral fluency assessment. The remaining assessments will only be given, if the student scores below 50th%.

Homeless & Foster Students

- Students must reside in one of our authorized counties in order to remain enrolled.

Staff Protocol for Crisis Response

Suicide, Self-Harm, Emotional Distress or Mental Health Concerns

When a student is identified by a staff member as potentially suicidal, inducing self-harm, experiencing emotional distress, or having mental health concerns, they will follow the protocol provided for each scenario listed below. Additional information can be found in our Suicide Prevention Policy

Alarming Concerns of Any Kind

Crisis Team should be notified immediately of any student involved in a crisis or tragedy of any kind, including but not limited to:

- potential child abuse/neglect
- drug use or overdose
- hospitalization of any kind (psychiatric, eating disorders, other medical, etc)
- death of a family member
- hostage situations
- car accidents resulting in serious injury
- run away from home
- student/parent arrest
- police activity

Crisis Team:

The Crisis Team will support, guide, and intervene on behalf of students, families, and staff during or after crisis situations. Due to the virtual nature of EACS, the Crisis Team relies on staff to swiftly inform them of concerning situations.

Monday-Friday 8:00-5:00: Contact **CORE Crisis Team**

Outside of School Hours: Contact Keri Schneeweiss or Heidi Gasca

CORE Crisis Team:

Larissa Allen-Jefferson, *School Counselor: lallenjefferson@excelacademy.education*
Daniel Favela, *School Counselor: dfavela@excelacademy.education*
April Saade, *Elementary Principal:* (949) 774-6231 asaade@excelacademy.education
Lisa Durham, *School Counselor:* (949) 774-5799 ldurham@excelacademy.education

Supporting Members:

** These staff members will be contacted by the Core Crisis Team as deemed necessary**
Rebecca Metoyer, *School Psychologist:* (714) 367-6749, rmetoyer@excelacademy.education
Noell Scott, *School Psychologist:* (949) 382-1198, nscott@excelacademy.education
Keri Schneeweiss, *Director of Educational Services*: (949) 742-2399, kschneeweiss@excelacademy.education
Heidi Gasca, *Executive Director*: (949) 412-3122, hgasca@excelacademy.education

Staff Contacted when Student is in Immediate Crisis

- **Advise parents to call 911, or take them to the ER.**
- **If the student's life is in immediate danger & the parent does not seek immediate support**, ToR should call 911
- If parent refuses to access treatment for a student who has been identified to be at risk for suicide or emotional distress, the Crisis Team will meet with the parent to identify barriers to treatment and work to rectify the situation. If follow-up care is still not provided, an Excel Academy staff member may report the incident to Child Protective Services.

    - ❖ LA County DCFS: (800) 540-4000
    - ❖ OC County CPS: (714) 940-1000 or (800) 207-4464
    - ❖ Riverside DCSS: (800)442-4918
    - ❖ San Bernardino CPS: (800) 827-8724

- San Diego CPS: (858) 560-2191 or (800) 344-6000
- Ventura County CFS: (805) 654-3200 or 1-800-754-7600.
- National Child Abuse Hotline: (800) 442-4453

ToR Protocol After Crisis

If the ToR learns of an attempted suicide, harm to self/others, admittance to a treatment program, or any other alarming concern follow the protocol below:

1. **Send Core Crisis Team an email (list of emails on page 1)**
    a. State "URGENT CRISIS TEAM: (first initial). (last name)" in the subject line, notifying them of all known details of the situation.
2. **Call Core Crisis Team Members until you speak with someone:** School Counselors, Elementary Principal
3. The Crisis Team will work together to support the student, family, & ToR.
4. Once the situation is stable, an SST Meeting may be held, if appropriate

Active Harm to Self/Others with Excel Staff Present

In the case Excel Staff is present when a student attempts suicide, follow the protocol below:

1. **Immediately call 911**
2. **Supervise the student to ensure their safety until help arrives**
3. **If possible, assign another Excel Staff Member to call Core Crisis Team Members until you speak with someone:** School Counselors, Elementary Principal
    a. If parent/guardian was not present, Crisis Team will contact the parent and assist them.
4. **Send Core Crisis Team an email (list of emails on page 1)**
    a. State "URGENT CRISIS TEAM: (first initial). (last name)" in the subject line, notifying them of all known details of the situation.
5. Crisis Team will work together to support the student, family, & ToR.
6. Once the situation is stable, an SST Meeting will be held.

Reporting All Homicidal Threats is Required by Law

The new statutes require any school district employee interacting with students in grades 7 through 12, inclusive, who observes a threat or perceived threat that a student is going to "commit a homicidal act related to school or school activity" to immediately report such threat to local law enforcement. (Ed. Code, § 49393.) Any report of a homicidal threat must include any evidence associated with the threat or perceived threat. If two or more school employees observe the same concerning conduct, a report by one of the employees is sufficient to meet the obligation of all of the employees.

A "threat or perceived threat" is defined by the law as: "any writing or action of a pupil that creates a reasonable suspicion that the pupil is preparing to commit a homicidal act related to school or a school activity." (Ed. Code, § 49390(e).) A threat or perceived threat may be based on a student's "possession, use, or depictions of firearms, ammunition, shootings, or targets in association with infliction of physical harm, destruction, or death in a social media post, journal, class note, or other media associated with the pupil." A threat or perceived threat may also be based on "a warning by a parent, pupil, or other individual."

If local law enforcement is notified of any threat or perceived threat, SB 906 requires the law enforcement agency or school site police—with LEA support—to immediately conduct an investigation and assessment of the reported threat. The investigation must include "a review of the firearm registry of the Department of Justice" and if justified by reasonable suspicion, a search of the school site. (Ed. Code, § 49394.)

SB 906 mandates each LEA provide all parents TK-12 "information related to the safe storage of firearms" in the required annual notification, which means an LEA's first disclosure would be required in the upcoming 2023-2024 school year. This is included in the Parent/Student Handbook. (Ed. Code § 49392.)

Signs of Suicide, Self-Harm, & Emotional Distress

Self-Harm Behavior that is self-directed and deliberately results in injury or the potential for injury to oneself. Can be categorized as either nonsuicidal or suicidal. Although self-harm often lacks suicidal intent, youth who engage in self-harm are more likely to attempt suicide. For example:

- Cutting
- Burning
- Head banging

Risk Factors for Suicide

- Direct statements about suicide
- Indirect statements about harming themselves

- Expressing the desire to be dead
- Suicide ideation: talking about specific plans and/or details of suicide
- Suicide contagion: student knows someone who recently died by suicide
- Family history of suicide
- Prior suicide attempt
- Self-medication with drugs or alcohol
- Promiscuous behavior
- High-risk behaviors

Warning Signs

- Suicidal ideation
- Substance abuse
- Purposelessness
- Anxiety and agitation
- Feeling trapped
- Feeling hopeless
- Withdrawal, Isolation
- Anger
- Recklessness
- Mood Fluctuations
- Significant change in behavior and/or physical appearance
- **Any other unusual or upsetting behavior**

ToR Referral Protocol for Mental Health Conditions

Mental Health Condition

A state of mental and emotional being that can impact choices and actions that affect wellness. Mental health problems include:

- Mental and substance abuse disorders
- Anxiety
- Depression
- Bipolar disorder
- Obsessive compulsive disorder
- Oppositional defiant disorder, etc

ToR Protocol

1. **Send Core Crisis Team an email**
    a. State "IMPORTANT: (first initial). (last name)" in the subject line, notifying them of the condition.
2. School Counselor will reach out to the family to ensure the student is receiving proper support
3. If they need more support, an SST Meeting will be held with the ToR & Crisis Team

Crisis Services and Resources for Students:

Click here for a link to Mental Health Referrals by County

Care Solace
EACS provides *Care Solace* service for students, staff, and their families. *Care Solace* is a mental health care coordination service that connects people to mental health care covered by their insurance or on a sliding scale. *Care Solace* connects clients to *more* than counseling. They also connect people to substance use treatment centers (rehab), inpatient/residential programs, outpatient programs, psychological evaluations, and intervention services.
https://caresolace.com/site/excelacademy

CalHOPE Warm Line:

The CalHOPE warm line connects callers to other people who have persevered through struggles with stress, anxiety, depression—emotions triggered by circumstances and events in everyday life. The peer counselors listen with compassion, provide non-judgmental support and guide you to additional resources that can give hope and help them cope.

Call: (833) 317-HOPE (4673)

Live Chat
https://www.calhope.org/

National Suicide Prevention Lifeline: The lifeline is a 24-hour, toll-free suicide prevention service available to anyone in suicidal crisis or their friends and loved ones. Call or text 9-8-8. Callers are routed to the closest possible crisis center in their area.
https://988lifeline.org/

Suicide online Chat format (similar to texting): Lifeline Chat is a service of the National Suicide Prevention Lifeline, connecting individuals with counselors for emotional support and other services via web chat. All chat centers in the Lifeline network are accredited by CONTACT USA. Lifeline Chat is available 24/7 across the U.S

https://suicidepreventionlifeline.org/chat/

The Trevor Lifeline: The only nationwide, around-the-clock crisis intervention and suicide

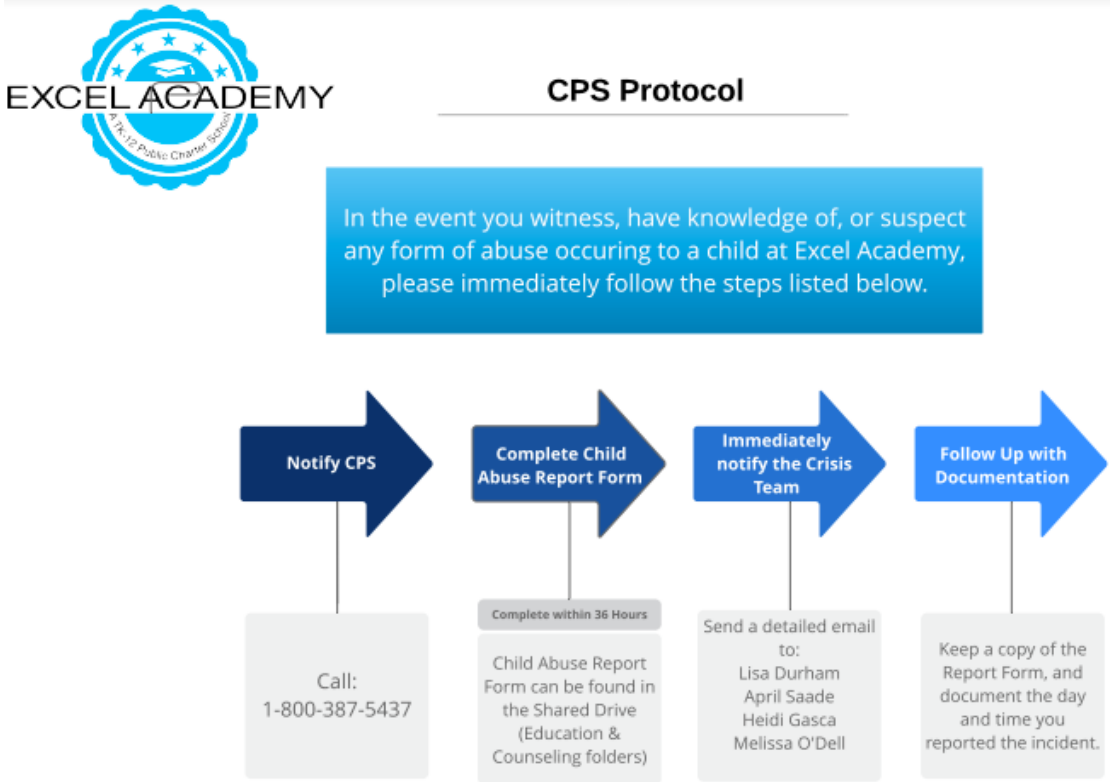
prevention lifeline for lesbian, gay, bisexual, transgender, and questioning young people, 13-24, available at 1-866-488-7386.

TrevorChat: A free, confidential, secure instant messaging service that provides live help to lesbian, gay, bisexual, transgender, and questioning young people, 13-24 years old, access through your computer.
www.thetrevorproject.org

Crisis Text Line is a free, 24/7, confidential text message service for people in crisis. Text **HOME** to **741741** in the United States

https://www.crisistextline.org/

CPS Protocol



Mandated Reporter Form

Child Protective Services

- LA County DCFS: (800) 540-4000

- OC County CPS: (714) 940-1000 or (800) 207-4464
- Riverside DCSS: (800)442-4918
- San Bernardino CPS: (800) 827-8724
- San Diego CPS: (858) 560-2191 or (800) 344-6000
- Ventura County CFS: (805) 654-3200 or 1-800-754-7600.
- National Child Abuse Hotline: (800) 442-4453

Virtual Learning Schedule (Grades 1-3)

Monday	Tuesday	Wednesday	Thursday	Friday
8:30-8:45 Morning Meeting/ Attendance	**8:30-8:45** Morning Meeting/ Attendance	**8:30-8:45** Morning Meeting/ Attendance	**8:30-8:45** Morning Meeting/ Attendance	**8:30-8:45** Morning Meeting/ Attendance
8:45-9:45 Science, Social Studies, SEL	**8:45- 10:15** ELA	**8:45- 10:15** ELA	**8:45- 10:15** ELA	**8:45-9:45** Science, Social Studies, SEL
Independent Study	**10:15-10:30** BREAK	**10:15-10:30** BREAK	**10:15-10:30** BREAK	*Independent Study*
	10:30-11:30 Math	**10:30-11:30** Math	**10:30-11:30** Math	
	11:30-12:00 LUNCH	**11:30-12:00** LUNCH	**11:30-12:00** LUNCH	
	12:00-12:35 Science, Social Studies, SEL	**12:00-12:35** Science, Social Studies, SEL	**12:00-12:35** Science, Social Studies, SEL	

	Independent Study	*Independent Study*	*Independent Study*	

Virtual Learning Schedule (Grades 4-6)

Monday	Tuesday	Wednesday	Thursday	Friday
8:30-8:45 Morning Meeting/ Attendance	**8:30-8:45** Morning Meeting/ Attendance	**8:30-8:45** Morning Meeting/ Attendance	**8:30-8:45** Morning Meeting/ Attendance	**8:30-8:45** Morning Meeting/ Attendance
8:45-9:45 Science, Social Studies, SEL	**8:45- 10:15** ELA	**8:45- 10:15** ELA	**8:45- 10:15** ELA	**8:45-9:45** Science, Social Studies, SEL
Independent Study	**10:15-10:30** BREAK	**10:15-10:30** BREAK	**10:15-10:30** BREAK	*Independent Study*
	10:30-11:30 Math	**10:30-11:30** Math	**10:30-11:30** Math	
	11:30-12:00 LUNCH	**11:30-12:00** LUNCH	**11:30-12:00** LUNCH	
	12:00-12:35 Science, Social Studies, SEL	**12:00-12:35** Science, Social Studies, SEL	**12:00-12:35** Science, Social Studies, SEL	

	Independent Study	*Independent Study*	*Independent Study*	

Virtual Learning Schedule (Grades 7-8)

Monday	Tuesday	Wednesday	Thursday	Friday
8:30-9:50 Social Studies Grade 8 Science Grade 7	**8:30- 9:45** Math-Grade 8 English-Grade 7	**8:30- 9:45** Math-Grade 8 English-Grade 7	**8:30- 9:45** Math-Grade 8 English-Grade 7	**8:30-9:50** Social Studies Grade 8 Science Grade 7
Independent Study	**9:45-9:55** BREAK	**9:45-9:55** BREAK	**9:45-9:55** BREAK	*Independent Study*
	9:55-11:00 Social Studies-Grade 7 Science-Grade 8	**9:55-11:00** Social Studies-Grade 7 Science-Grade 8	**9:55-11:00** Social Studies-Grade 7 Science-Grade 8	
	11:00-11:30 LUNCH	**11:00-11:30** LUNCH	**11:00-11:30** LUNCH	
	11:30-12:35 Math-Grade 7 English-Grade 8	**11:30-12:35** Math-Grade 7 English-Grade 8	**11:30-12:35** Math-Grade 7 English-Grade 8	

	Independent Study	*Independent Study*	*Independent Study*	

Meetings and Communication (Virtual)

Once you have access to your student roster in the SIS, you can begin reaching out to your families immediately! See **"How to Access Class Roster in SIS"** below for more information.

Dress Code and Zoom Background

Please dress professionally for all class sessions and office hours, as well as parent meetings. Please do not wear workout clothes or tank tops. Please be mindful of your Zoom background and keep your space professional. If your computer allows, use the school virtual backgrounds located in the Shared Drive.

Initial ToR Email (Virtual)

ToRs will send an email (Welcome Letter Virtual ToR) to their families the first week of August, or as soon as they are placed on a Virtual ToR roster. This email will serve to introduce the ToR to the family and let the family know the ToR will be calling soon to introduce themselves and confirm contact information.

Meeting with Parents (Virtual)

In the initial email, your families are given a link to sign up for a planning meeting with you. This meeting is a time to confirm student details and ensure the family knows what to expect and how to plan for the year. Use the Initial Meeting Checklist to guide your phone call.

During the meeting, Virtual ToRs will review the following documents with parents:

Acknowledgement of Responsibilities-Virtual Path

The AoR is a highlight of important policies and procedures that are signed at the same time as the Master Agreement (see below). The virtual path has its own AoR that is different from the personalized path.

Go through the AoR document line by line with the parent/guardian to ensure they understand what each statement means.

- ❏ Many parents get to a point in the semester where they are issued Progress Improvement Notifications (PINs) because they did not understand the school's policies and procedures.
- ❏ Explain any policy changes for the school year that will directly affect returning parents/guardians.

Master Agreement (MA)

The Master Agreement is the contract between the school, ToR and the parent/student which acknowledges that the student is officially enrolled in Excel Academy for the school year and that the student/parent agrees to abide by the school's requirements.

- ➢ Prior to signing the MA, please confirm the information in SIS is correct. (Student Name, grade level, birthdate, telephone number, address and email).
  - ○ For inaccuracies, please email **admissions@excelacademy.education with the** corrections that need to be made. Email subject line: Important: *SIS Correction*
  - ○ If the student's grade level is wrong in the SIS and they already signed the MA, an addendum to the MA can be created and signed to correct this inaccuracy, but it must be fixed in SIS by admissions prior to doing the addendum.
  - ○ Ask if there are any custody arrangements and ensure to get a copy of the custody agreement to file with the registrar (registrar@excelacademy.education).
- ➢ Once parents/students understand the program and the school's policies and procedures, have them sign the Master Agreement for each student

Student Start Date

The student start date will either be the ***first day of school*** or *the date in which the Master Agreement was signed and approved* (after school begins).

Please note: If a family wishes to start with EACS on a date later than the signature date on the MA, simply contact admissions (admissions@excelacademy.education) to adjust the date in school pathways to the date they wish to begin. The MA does ***not*** need to be redone.

CCP Agreement (CCPA)
All students of Excel Academy MUST have a signed CCP Agreement on file prior to any purchase orders being placed. Go through the document with the parent/guardian to ensure they understand how instructional funds work. The ToR will keep this document on file for each student and may upload a digital copy to the Notes section of the SIS Student page (see Contact Manager section of this manual).

EACS Technology Lease Agreement
All students in the Virtual Pathway will need to fill out and sign an EACS Technology Lease Agreement for the computers they are issued as a part of the program. Make sure this document is filled out correctly and completely prior to handing out any technology equipment of any kind. This includes webcams or other smaller technology provided by the school.

Household Data Form
This document is in the Parent Portal of SIS. The following video shows parents how to access the Household Data Form in the SIS. (Household Data Form)

Parent-Teacher Conferences
(Virtual Path)

Virtual ToRs will hold parent-teacher conferences twice per year. These conferences will serve to facilitate a more in-depth discussion with the parent about the student's academic progress and the learning going on in the classroom. It is important to note that regular communication should occur with the parent outside of these two conferences. Parents should receive some type of weekly communication from their student's Virtual ToR. Should concerns about a student or situation involving a student arise, a telephone call or video call should be made to the parent/guardian.
*Guide to Creating Appointment Slots in Google Calendar

Communication and Student Engagement-Virtual

Communication between teachers and parents/guardians is essential to the success of the student. Because students will be working on assignments and projects at home, the parent plays a key role in keeping students focused and on track.

Communication with parents/guardians should occur regularly and be as clear and concise as possible. The ToR should ensure all parents can easily instruct students on what needs to be accomplished at home, without relying on the student to relay any information. Communication can become muddled and unclear when left to students to disseminate. Buzz (the LMS used by FlexPoint) allows teachers to assign due dates and easily pace student learning for the year

based on beginning and end dates. This pacing will need to be completed ***prior*** to the beginning of the school year so that all stakeholders have access to a student's learning in advance of the school year beginning. Adjustments may need to be made for students with an IEP. In those cases, the case manager will work with the Virtual ToR to ensure the student is set up to successfully complete their learning for the year.

Communicating with Students

At no time should communication outside of the classroom setting between a ToR and student occur without the parent/guardian also being included. In order to create an atmosphere of trust and transparency, ToRs should *never* contact a student via email, phone, text or any other messaging system *without the parent/guardian also being included in that correspondence*. **Even then, prior permissions from the parent/guardian should be granted before including the student in a conversation.** EACS assigned student Gmail accounts should always be used in communication involving the student and parent.

Contacting Parents Prior to Start of School

You will begin communicating with parents in August, upon your return from summer break. It is important to touch base and ensure students are still planning to attend Excel Academy and the pathway they signed up for when registering. Often, parents enroll students in the spring and change their mind once August arrives. Should the ToR reach out to a parent and they no longer wish for their student to attend, please inform Admissions to ensure the student is removed from your roster in SIS.

For instances ***where the ToR is unable to make contact with a parent,*** please follow the email procedure listed below.

No Parent Response After 5 Days

Send the following email:

Hello Mr. and/or Mrs. _____

My name is _____ and your student has been assigned to my class for the 2022/2023 school year..

I have attempted to contact you via phone and email several times during the last few days, but have been unsuccessful in reaching you. I am eager to partner with you in your student's educational journey. However, if I do not hear from you within the next 2 calendar days, I will assume you are no longer interested in our school and admissions will move your student back to the enrollment waitlist.

Thank you,

(Excel Academy Signature)

After sending the email above:
If the parent does not reply within 2 calendar days:

1. Notify Admissions (admissions@excelacademy.education) and "cc" Christa Nick
2. that the student cannot be reached and needs to be placed back on the intake listAdmissions will contact the family and place the student(s) back on the student intake tab with a designation of previously placed (PP).

If a parent responds that they are no longer interested in attending EACS, also notify admissions and Nick Romo.

SIS-Student Information System

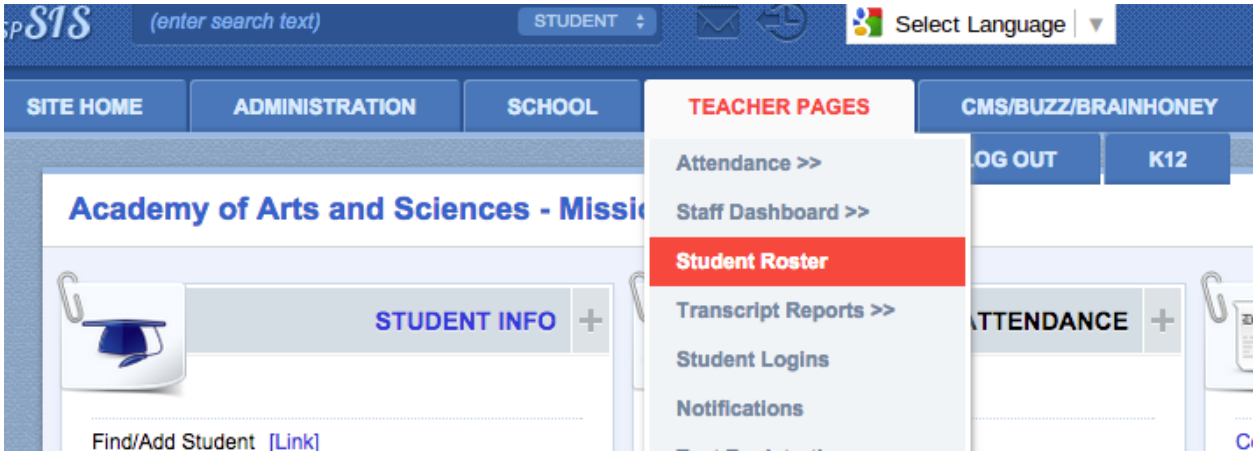
How to View Class Roster In SIS

Assigned Students:
Each ToR is assigned a classroom roster of students in the Student Information System (SIS). Students are placed on the classroom rosters both prior to the school year and after the school year begins. ToRs can view classroom rosters in the Student Information System (SIS). If you are a new teacher and do not yet have a login, please reach out to Keri Schneeweiss @ kschneeweiss@excelacademy.education.

Please note: There are **two different scopes** for Excel Academy's students, based on student location. ToRs need to login to *each scope separately* in order to see ALL assigned students.

LOGINS for SIS scopes:
https://excelcs.plsis.com/mod.php/login.php For students in "ExcelCS " Scope
https://exceleast.plsis.com/mod.php/index.php For students in "ExcelEast" Scope

Once the ToR has logged into SIS, go to "Teachers," then "PLS/Student Roster."



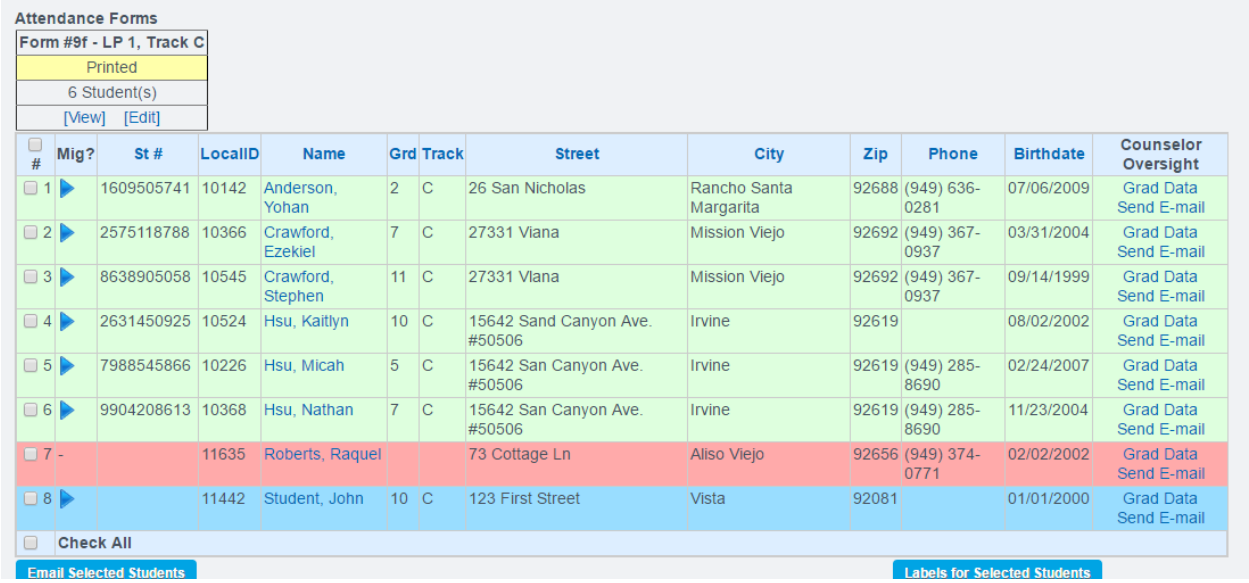
The student roster will appear. Check to see that the correct school year and date range are selected at the top. If the date needs adjusting, make sure to click "Update" after the date and/or semester has been changed.

Enrollment status and Additional Information

Prior to the start of school, students are pre-enrolled in the SIS and show up on the ToR SIS roster in BLUE. *This indicates that the MA is ready to be prepared and sent to the family for signature by the ToR.* (**Note**: **Every student will show up in BLUE prior to the start of the school year. We do not need withdrawal verification before the first day of school 08/28/23**)

First Day of School and After:
Each time the enrollment team assigns a student to a ToR **after school begins**, the student will be highlighted in RED in the PLS/Student Roster. This notifies the ToR that the student has been added, but still needs to ***verify the exit date*** *of when they withdrew from their previous school.* They can verify this date by having the parent send an email stating the date they withdrew from [list name of previous] school. The ToR needs to forward this email to admissions@excelacademy.education. The student will NOT be able to start school until this verification is processed.

Once the student MA has been signed, archived and approved, students show up in GREEN on the SIS roster. *The student in green is now active in school and will require daily attendance to be taken.*



Attendance Forms

Form #9f - LP 1, Track C

Printed

6 Student(s)

[View] [Edit]

#	Mig?	St #	LocalID	Name	Grd	Track	Street	City	Zip	Phone	Birthdate	Counselor Oversight
1	▶	1609505741	10142	Anderson, Yohan	2	C	26 San Nicholas	Rancho Santa Margarita	92688	(949) 636-0281	07/06/2009	Grad Data Send E-mail
2	▶	2575118788	10366	Crawford, Ezekiel	7	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	03/31/2004	Grad Data Send E-mail
3	▶	8638905058	10545	Crawford, Stephen	11	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	09/14/1999	Grad Data Send E-mail
4	▶	2631450925	10524	Hsu, Kaitlyn	10	C	15642 Sand Canyon Ave. #50506	Irvine	92619		08/02/2002	Grad Data Send E-mail
5	▶	7988545866	10226	Hsu, Micah	5	C	15642 San Canyon Ave. #50506	Irvine	92619	(949) 285-8690	02/24/2007	Grad Data Send E-mail
6	▶	9904208613	10368	Hsu, Nathan	7	C	15642 San Canyon Ave. #50506	Irvine	92619	(949) 285-8690	11/23/2004	Grad Data Send E-mail
7	-		11635	Roberts, Raquel			73 Cottage Ln	Aliso Viejo	92656	(949) 374-0771	02/02/2002	Grad Data Send E-mail
8	▶		11442	Student, John	10	C	123 First Street	Vista	92081		01/01/2000	Grad Data Send E-mail

Check All

Email Selected Students

Labels for Selected Students

Note: The ToR is able to see all the necessary information to make initial contact with all of their families at any stage of the enrollment process.

Transfer Students:

At times it is necessary to transfer a student from a Personalized ToR to a Virtual ToR. The process is similar to that of an assigned student, except, once the school year begins, you will complete an Addendum to the original Master Agreement (MA) , rather than a completely new Master Agreement. For instructions on this process, please see the addendum video and "How to Create an Addendum" below.

Custody Notes in the SIS

At times there will be parents that have shared custody agreements or have special custody arrangements that the school needs to know about. There are also times when parents have restricted custody arrangements (certain persons are not to be near the students.) For all of these situations, court papers must be on file in the office. *** We cannot restrict a parent from their child unless we have this information.

If a student's parents are separated or divorced, ask them about any custody arrangements they might have. If the student will be split between the father and mother's house during school hours, we will need to have **both the father and mother sign the Master Agreement in SIS before archiving the document.** If you need to add a signature after archiving an MA, you can always do an addendum.

Go to the dashboard of the student.

This icon is where you will find all of the necessary information about custody arrangements:

*Please contact the Registrar's office (registrar@excelacademy.education) if you have any questions or need to make Excel aware of custody arrangements that are not in the system.

How to Create a Master Agreement

The Master Agreement (MA) is a student-parent-teacher contract outlining the conditions and responsibilities of all parties for our independent study at Excel Academy. When a student opts into independent study, Ed Code requires that there is an agreement as to how it will be completed. This document fully enrolls a student.

The MA lists all of the courses that a student is attempting during the school year. TK-6th grades students will have courses loaded automatically by the back office. ToRs will add classes for 7th through 12th grade students.

If a TK-8th grade student is missing their preloaded courses, please add their names and the needed information onto the TK-12 Missing Students Classes/Curriculum doc. Important: ***An MA cannot be completed for a student if the student is missing classes!***

Dates and signatures on a master agreements are very important:

- The student's signature date marks the first day of attendance for that student.
- Dates should NEVER be altered on a master agreement.
- The parent and student must sign/type first and last names in the designated areas. Last names must be included for parents and students older than 1st grade. You must send it for a new signature if it is not signed correctly.
- Any parent or guardian who will sign attendance must be listed as a signatory on the MA.

Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum.

Resources
How to Create a Master Agreement- video
Step-by-Step directions for TK- paper
Step-by-Step directions for HS- paper

Signed MA's bridge with the ordering system overnight. Give a 24-48 hour window to allow OPS to recognize the new student.

How to Create an Addendum

Addendums are created for a variety of clerical purposes that are a *change* to the original MA:

- A transfer of a student to a new ToR
- An update to the student's classes (adding or changing a class)
    - Addendums are not needed when a student drops a class.

- Adding an additional parent or guardian signatory
- Changing the student's grade level

Addendums are dated **the date of change**. This is very important that the date is correct because it affects attendance, samples, and all ancillary documents in SIS.

Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum before creating an addendum for high school students.

Resources:
How to create and save an addendum

How to Add Student Courses in SIS

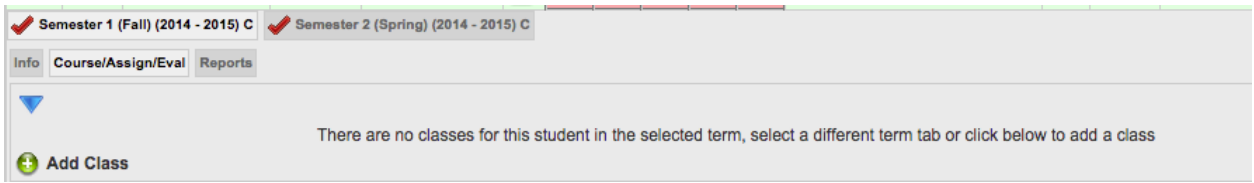
TK-8
TK - 8th grade students should already have their courses loaded for them by the back office. ***If a TK-8th grade student is missing their preloaded courses, please add their names and the needed information*** *onto the TK-12 Missing Students Classes/Curriculum doc. Please do not add the courses yourself. All Tk-8 students should have five classes: math, language arts, science, social studies and PE.*

*If you need to add a HS course for an advanced 7th or 8th grader, please use the instructions below. (*Please ensure you have followed the approval process for enrolling a 7th or 8th grade student into a high school level course.)*

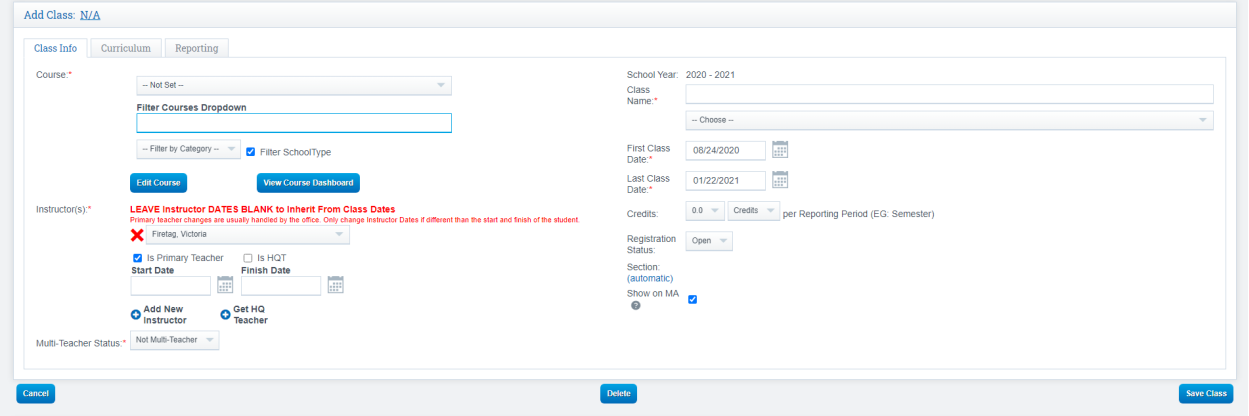
High school courses for both semesters need to be added at the beginning of the year to create the Master Agreement. Consult the High School Course Catalog for course descriptions, codes, for prerequisites. Please watch this video for Adding Classes to SIS before creating a master agreement.and How to Create a Master Agreement.

Instructions:

1. Once in the roster in SIS, click on the blue arrow next to the student's name. The box will expand and no courses should show. Click on the green "**Add Class**" button. You will be directed to the next screen.



2. This box below will open up. Please watch the ToR training video on How to Add Courses in SIS, which will give a thorough explanation of what information to choose in this box. Click here for written instructions.



3. If you cannot locate a course in SIS: Try searching with multiple keywords and filters. If your course is missing from SIS, please add it to this doc.
    a. For a-g courses, the course names will be prefaced by CP, BYU, EDG, EDY (except for ASL), FLV, LB, and TGS.
    b. For junior high school students taking high school courses, you will need to unclick the "Filter School Type" to find the high school courses.

How to Create a Master Agreement

The Master Agreement (MA) is a student-parent-teacher contract outlining the conditions and responsibilities of all parties for our independent study at Excel Academy. When a student opts into independent study, Ed Code requires that there is an agreement as to how it will be completed. This document fully enrolls a student.

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- Any parent or guardian who will sign attendance must be listed as a signatory on the MA.

Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum.

Resources
How to Create a Master Agreement- video
Step-by-Step directions for TK- paper
Step-by-Step directions for HS- paper

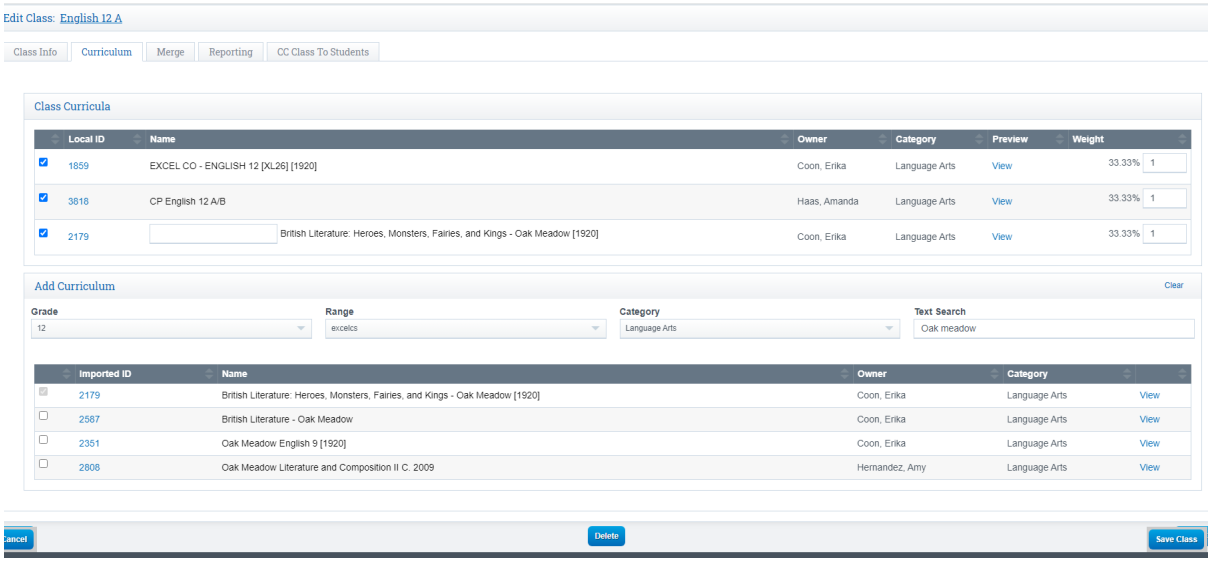
Signed MA's bridge with the ordering system overnight.

How to Add Curriculum Content to a Course in SIS

Curriculum content is the scope and sequence of the course in the form of lists of objectives/standards and assignments associated with textbooks, classes or the state standards.

Please watch these helpful videos and read the directions below:
Introduction to Curriculum Content
Adding Curriculum Content to Courses in SIS

1. To add/edit curriculum content from the dashboard, choose the green icon next to the student's course.
2. Choose the "Curriculum" tab to open the search.



3. Use the filters to find the correct curriculum and click the box next to the desired curriculum content to add it.

4. For additional detailed information about choosing appropriate curriculum, see the section *How to Complete AWRs*.

How to Show Daily Student Engagement (Grid Logs)

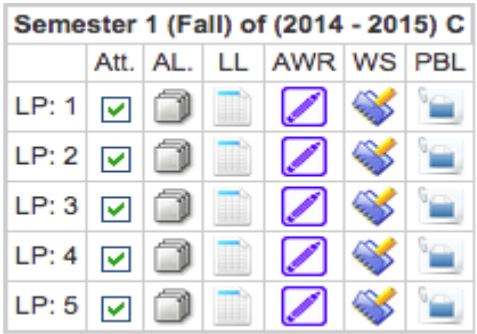
How to check grid logs for a single student:

1. In SIS, go to "Teacher Pages" and go to your student roster.
2. Choose the drop down arrow next to the student name.
3. Choose the 'reports' tab.

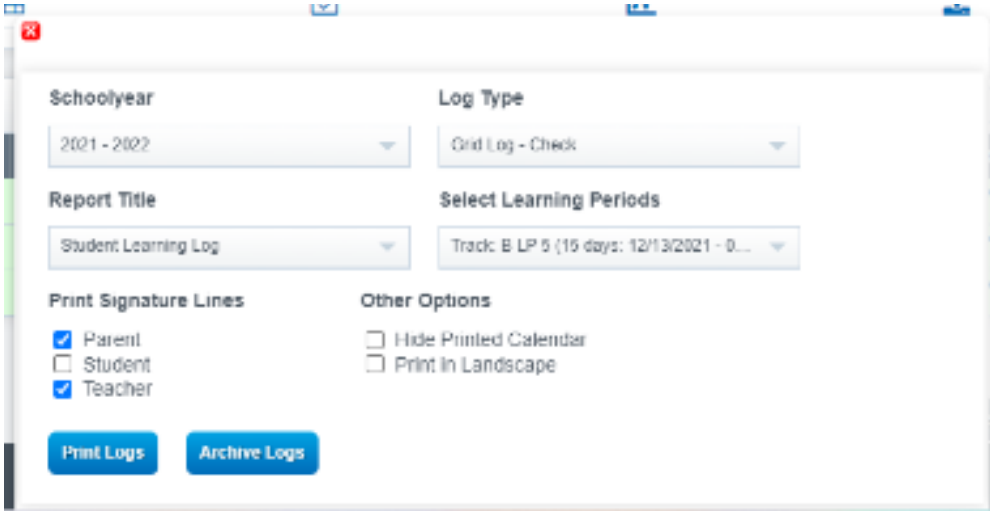
4. Choose the learning logs icon for the correct LP. This will open to the learning logs page. Make sure the Log type reads 'grid log check' and choose 'review log' button.
5. This should open the student's grid log. You are able to make edits and updates from this page.

How to check grid logs for your entire class roster:

1. In SIS, go to "Teacher Pages" and go to your student roster (instruction video here)
2. Once there, go to the box located above your roster and click on the "LL" icon next to the correct learning period (image #1 below). If you are using the 'new student roster' you will click the drop down for 'mass print reports' (image #2 below).



3. A box will open. In this box choose “grid log check” and ‘print logs”



4. This will load all grid logs for your entire roster. If you need to make changes to a grid log to reflect student engagement as dictated by the parent, use the instructions above for **How to check grid logs for a single student.**

How to Take Attendance in SIS ☑

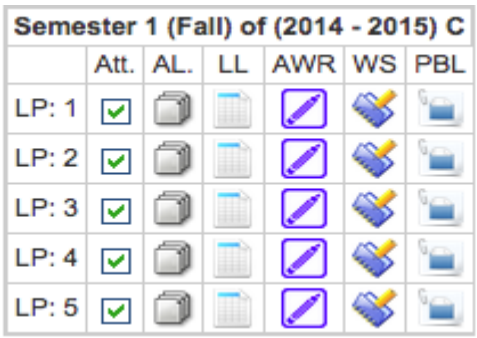
Each ToR will officially claim attendance by the Wednesday following the last day of each learning period.

Prior to claiming attendance, a ToR should have samples from the student.

First, make sure that all Attendance Grid Logs are sent out on the last day of the learning period. Make sure that the days in which the student was in attendance are checked. They cannot be sent *before* the last day of the learning period. Parents will sign electronically. You will be automatically notified via email that the parent has signed the grid log. Follow the link to the grid log to sign or find the log in your ‘Sign Document Compliance’ section of SIS. . You will sign **AFTER** the parent does.

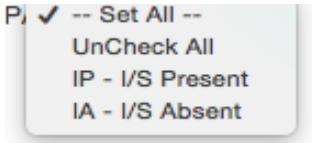
Second, once **all** of your attendance grid logs are returned, take attendance for your whole roster. Your signature should fall on a work day, not a weekend or holiday. (A parent signature on a weekend or holiday is fine.)

To do so, log into SIS, go to "Teacher Pages" and go to your student roster. Once there, go to the box located above your roster and click on the "Att" ☑ icon next to the correct learning period. (see below)



Your entire month of attendance will open up for your roster. There is a box at the top left of the screen with a drop-down menu that will allow you to claim all attendance at once rather than having to do it manually one student at-a-time.

Your entire month of attendance will open up for your roster. There is a box at the top left of the screen with a drop-down menu that will allow you to claim all attendance at once rather than having to do it manually one student at-a-time.
Change all students to IP – I/S Present and click the "Save" button on the screen.



You will be unable to change attendance once you click "save," so please proceed carefully.

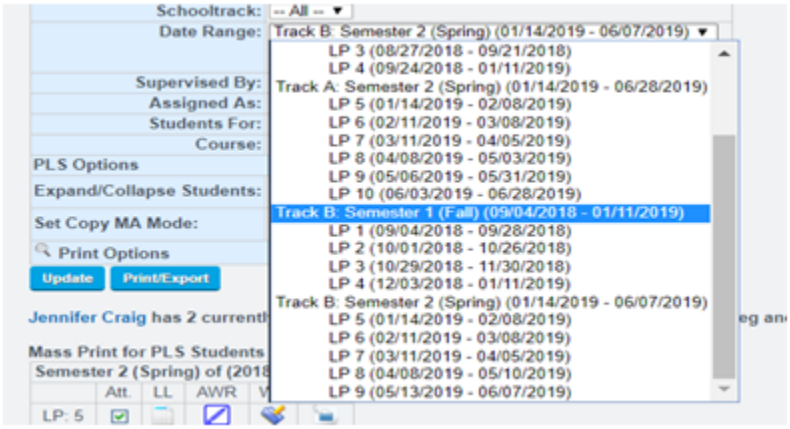
You will then print and archive your attendanceThese are helpful slides and a helpful video on this procedure .

Report Cards in SIS

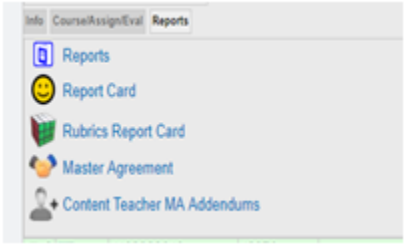
***Please refer to the shared report card folder for pertinent information and specific details.

At the end of each semester, ToRs will create electronic report cards in SIS for each student. *Grades TK-12 are required to have a report card.* This information can also be found in the shared drive under Assessments> Report Cards.

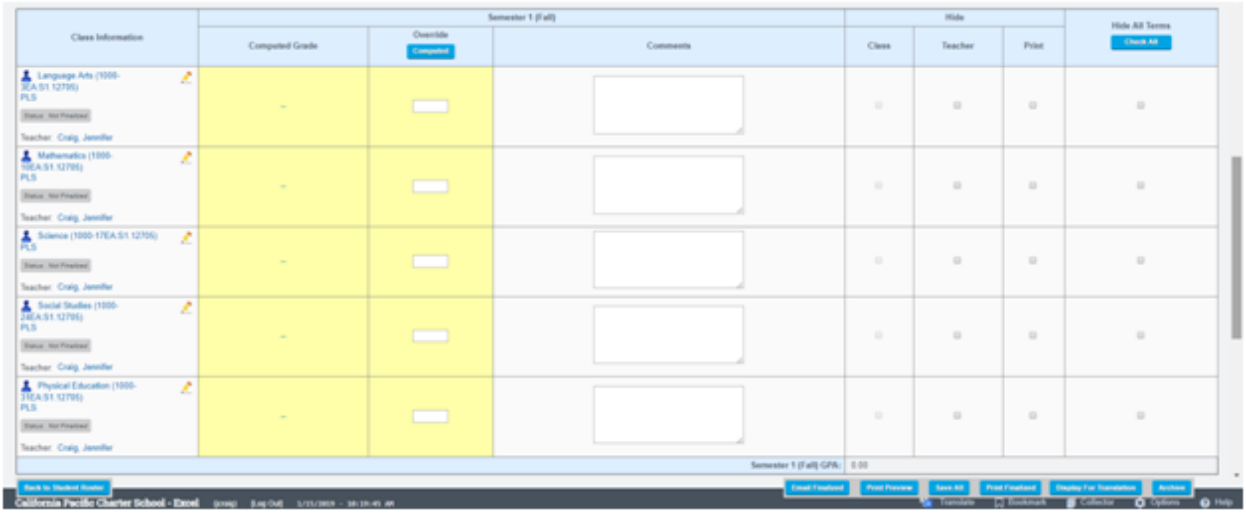
1. Login into the SIS
2. Go to your student roster
3. Use the drop down to find the Fall semester dates and click *Update* (Spring - find the semester two Spring dates and click *Update*.)



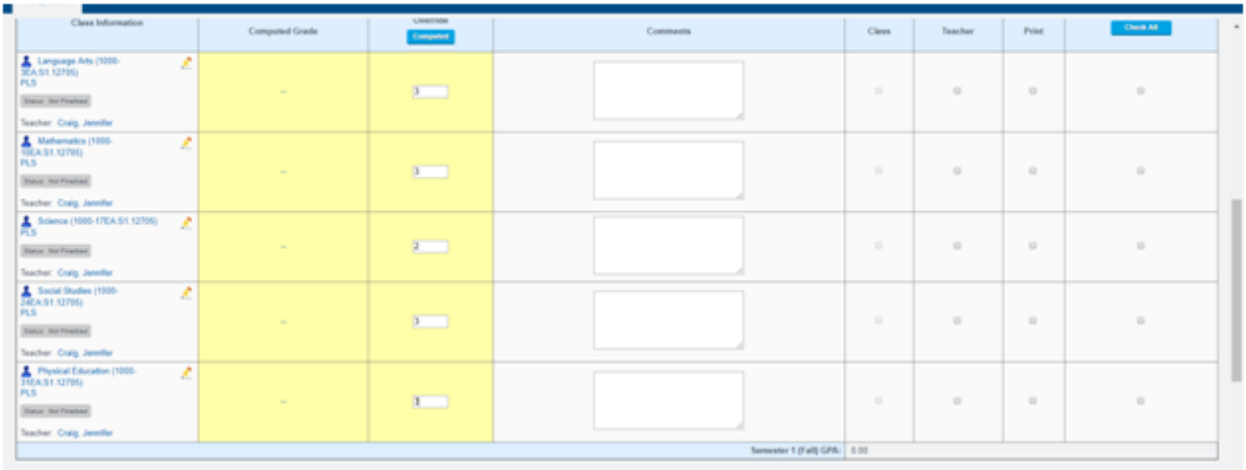
4. Next, click on *Reports* under the student's name, and from the list provided click *Report Card.*



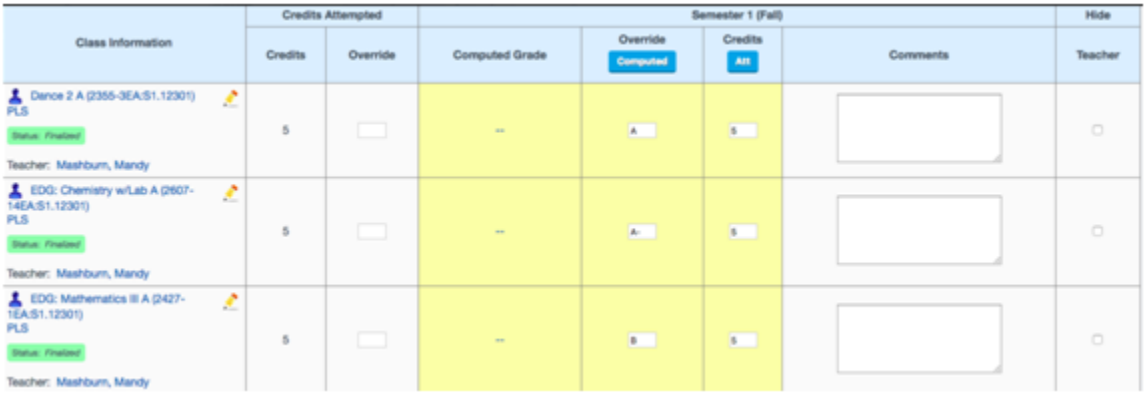
5. You will be directed to this screen (scroll down to see where you enter grades).



6. The above screenshot represents a TK-8 report card. ***You will NOT type in anything under the column titled *Computed Grade*. You will type in the grades under the column titled *Override Computed*.
7. TK-5 - Using the 4-1 scale, under the column *Override Computed* you will indicate the appropriate number (4, 3, 2, or 1) next to the designated subject.
8. Here is an example of the completed column with the appropriate grades.



9. Grades 6-8 - Using the A-F scale, under the same column as above (*Override Computed*) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 6-8 will earn letter grades (not numbers).
10. Grades 9-12 - Using the A-F scale, under the same column as above (*Override Computed*) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 9-12 will also earn credits (5 per semester) which will be indicated in the *Credits* column. ***You will only type in the shaded yellow columns. Once you type the credits in the shaded yellow column, the credits will also appear in the white column titled Credits Attempted/Credits. Example:

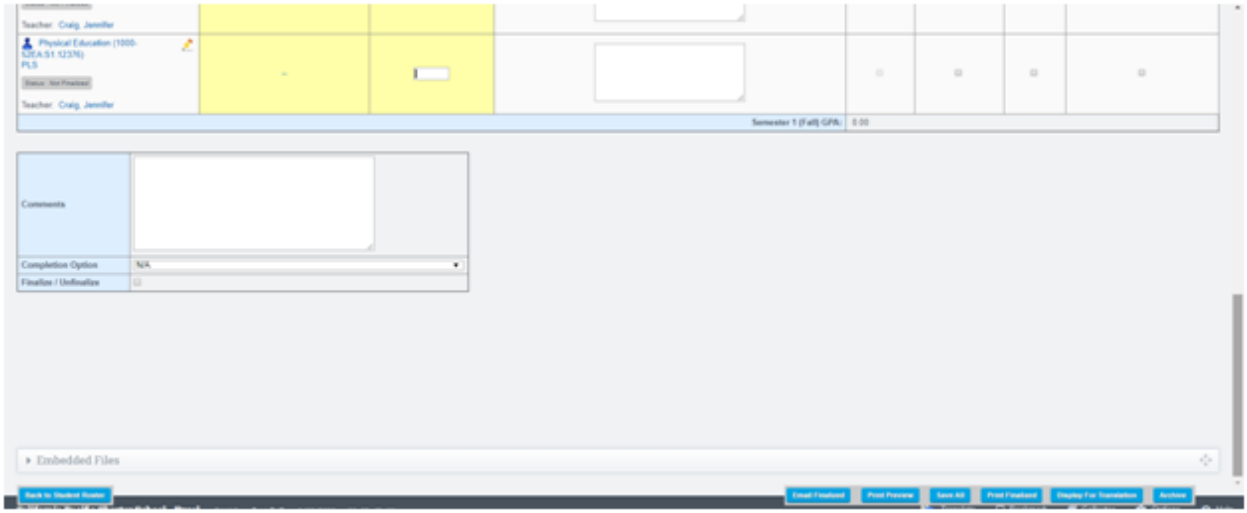


Class Information	Credits Attempted		Semester 1 (Fall)				Hide
	Credits	Override	Computed Grade	Override Computed	Credits All	Comments	Teacher
Dance 2 A (2355-3EA:S1.12301) PLS Teacher: Mashburn, Mandy	5		--	A	5		
EDG: Chemistry w/Lab A (2607-14EA:S1.12301) PLS Teacher: Mashburn, Mandy	5		--	A-	5		
EDG: Mathematics III A (2427-1EA:S1.12301) PLS Teacher: Mashburn, Mandy	5		--	B	5		

11. **Comments - Please refer to the report card folder.** Every student in grades TK - 12 should have at minimum one comment on the report card that has been chosen from the dropdown. Some students may have more than one depending on their progress in each subject. In the column titled Comments, you do not have to type any comments in line with the designated subject for your students in grades TK-12, **unless the student is performing below grade level as specified on the directions and FAQ**

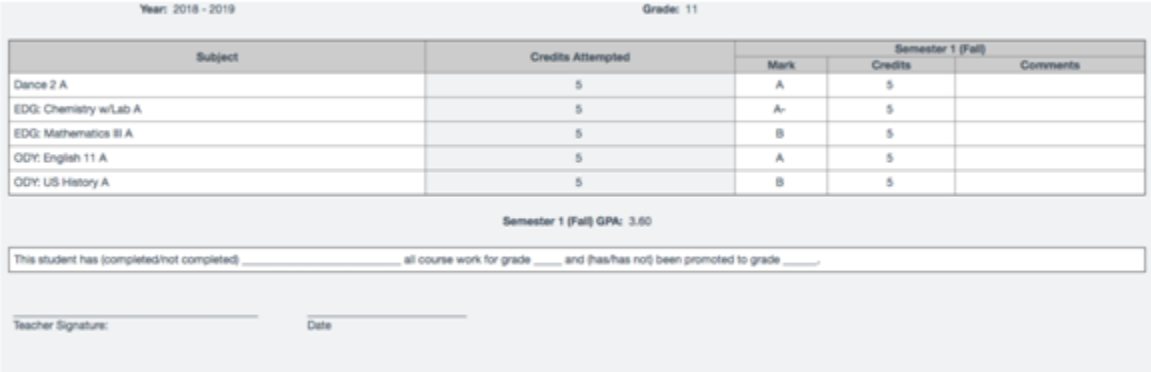
documents in the shared Report Card Resource Folder. There is a specific example for 6-8 grade students. Please refer to the shared folder.

12. If you had a student drop prior to the withdrawal deadline, simply hide the course; do not do an addendum. If your student withdrew after the deadline, remember to include the "W" or the "F" based on the withdrawal date.
13. ToRs will input "IP" for the grade of all concurrently enrolled courses and zero out the credit earned. Upon the receipt of the official transcript, the registrar will input the grade and credit earned and then email ToRs when complete. At this point ToRs can update the report card to reflect the college class grade if requested by the parent. However, once the registrar department inputs the grade and credit for college courses, then the parent can automatically see that reflected in their parent portal on the transcript view, thus updating the RC is not a necessity.
14. At the bottom of the report card, you will see another box titled *Comments*. For TK-5 students, please cut and paste the appropriate 4-1 grading scale.



15. ***IMPORTANT - DO NOT INDICATE SPED OR EL ANYWHERE ON THE REPORT CARD. Prior to creating a report card, please confirm with the Case Managers the grades of students with IEPs.
16. If you have questions about comments, please email Jenny Craig.
17. Please make sure to click *Save All* if you are not ready to finalize the report card, so you can come back to it at a later time.
18. **Click the box next to *Finalize* under the *Comments* box when you have completed the report card. The screen will become shaded.**
19. Then, click ***Save All.***
20. Click ***Archive* t**o sign and date (always the last day of the semesters.) Once archived, you will be directed to a new screen and you will see a blue arrow to click to *view,* which will create a PDF to save and print to send to your student/parent via email.
21. Make a copy of each report card to bring to the office to be filed in student cumulative folders.

***Here is a sample copy of a completed report card (without the student's name, grade, SSID).



Year: 2018 - 2019 Grade: 11

Subject	Credits Attempted	Semester 1 (Fall)		
		Mark	Credits	Comments
Dance 2 A	5	A	5	
EDG: Chemistry w/Lab A	5	A-	5	
EDG: Mathematics III A	5	B	5	
ODY: English 11 A	5	A	5	
ODY: US History A	5	B	5	

Semester 1 (Fall) GPA: 3.60

This student has (completed/not completed) _____ all course work for grade ____ and (has/has not) been promoted to grade _____.

Teacher Signature: Date

***FALL - Do not complete the sentence regarding promotion
***SPRING - Complete the sentence indicating promotion to the next grade level. For example - This student has completed all course work for grade _____ and has been promoted to grade _____.
Please indicate the promotion status on the RCs for HS students as...
Student in 12th grade who graduated...
has promoted to completion of required credits towards a high school diploma

Student who will be completing a fifth year in HS...
has been promoted to a fifth year

Student who will earn a certificate of completion...
has been promoted to certificate of completion

TK-5 Scale for Comments Box

4: Exemplary – Above Grade Level
3: Proficient – At Grade Level
2: Approaching Proficiency
1: Non-proficient

Helpful Hints -

****SIS did an update and now the *archive* button needs to be clicked in order for the report cards to be officially archived.

****If you choose to print at another time, you can go into your *archive* through SIS to print the report cards.
***ToRs will be provided with a shared folder to drop in report cards and progress reports for Admissions to put in student cumes. Please print a copy to keep in your students' files and bring a copy of each report card

alphabetized and paper clipped together to the February ALL staff meeting (FALL) and to the office no later than two weeks after the last day of school (SPRING).

****Progress reports are printed and not completed through SIS. Progress Reports are found in the shared Report Card Folder. MAKE A COPY FIRST AND KEEP THE BLANK ORIGINAL IN THE FOLDER FOR OTHERS TO USE. Please print a copy to keep in your students' files and bring a copy of each progress report alphabetized and paper clipped together to the February ALL staff meeting (FALL) and to the office on or before two weeks after the last day of school (SPRING).

Contact Manager and Student Notes

Recording important interactions with your families is crucial to maintaining a professional record of each student's time at Excel Academy. While not every interaction will need to be recorded in the Student Information System (SIS), the following instances warrant documentation in the contact manager by the appropriate person(s).

Contact Manager

- Documenting contact with your families is easy to do in the SIS. The first area this is possible is through Contact Manager. Here are some instances that would warrant documentation in the Contact Manager:, Important Phone Calls/Meetings between an administrator, teacher and/or parent

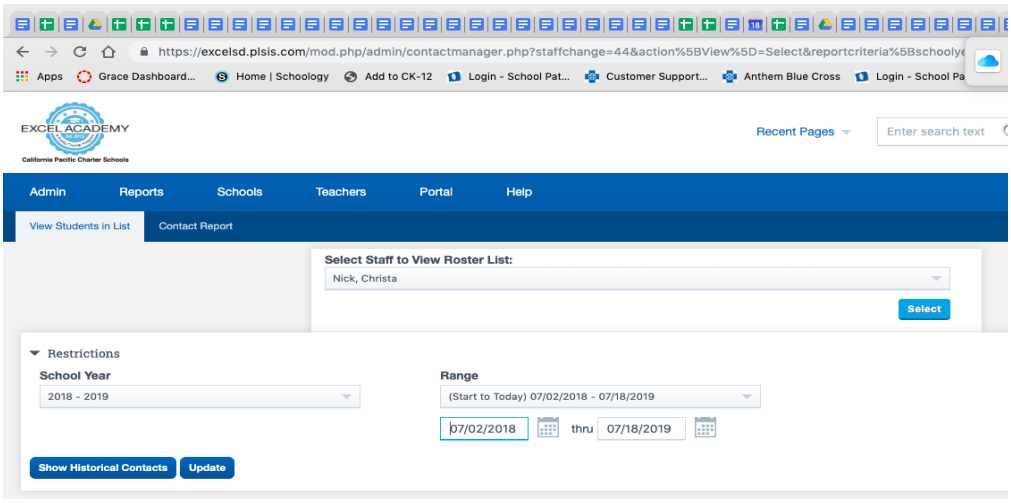
Examples:

- Injury or Incident at a school-sponsored event/field trip (contact should be made with BOTH the parent and admin and you would document that you talked with both.)
- A conversation with a parent discussing a PIN or any conversations about opting-out of state testing
- AIM, SST Meetings

To Access Contact Manager:

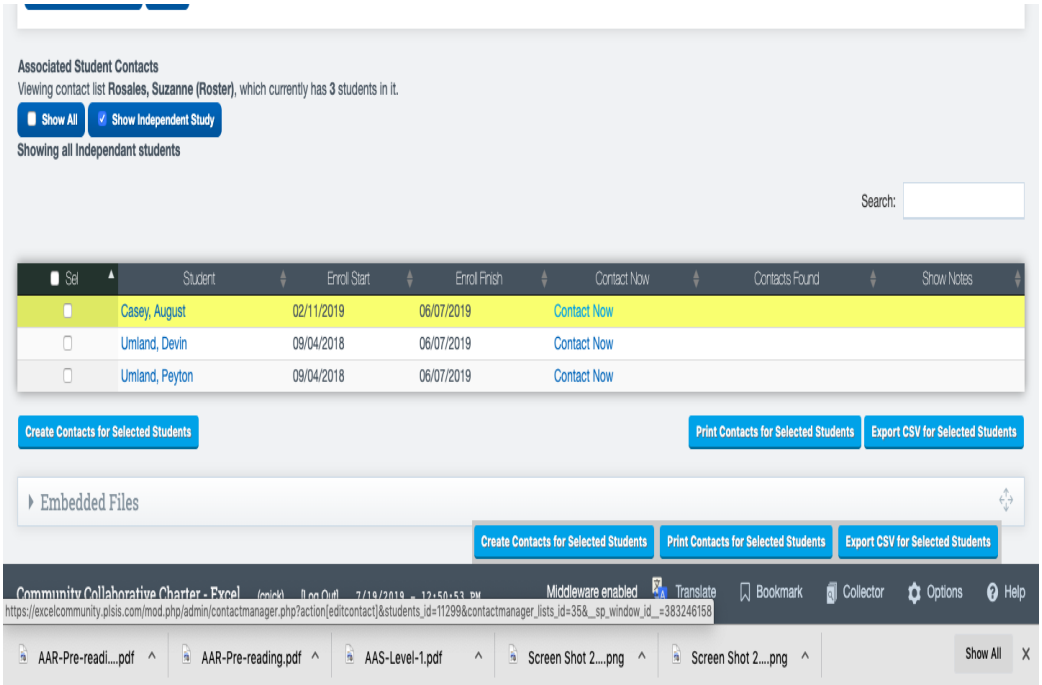
- **Go To "Teachers" Tab and scroll down to "Content Manager" and Select "Contact Manager" again in the menu.**
  - ➢ You can also get to the Contact Manager from the Home Screen and when on the student dashboard. Just look for the words "contact manager" and it will take you to the same place.

- **Then, you will get to a screen that looks like this:**

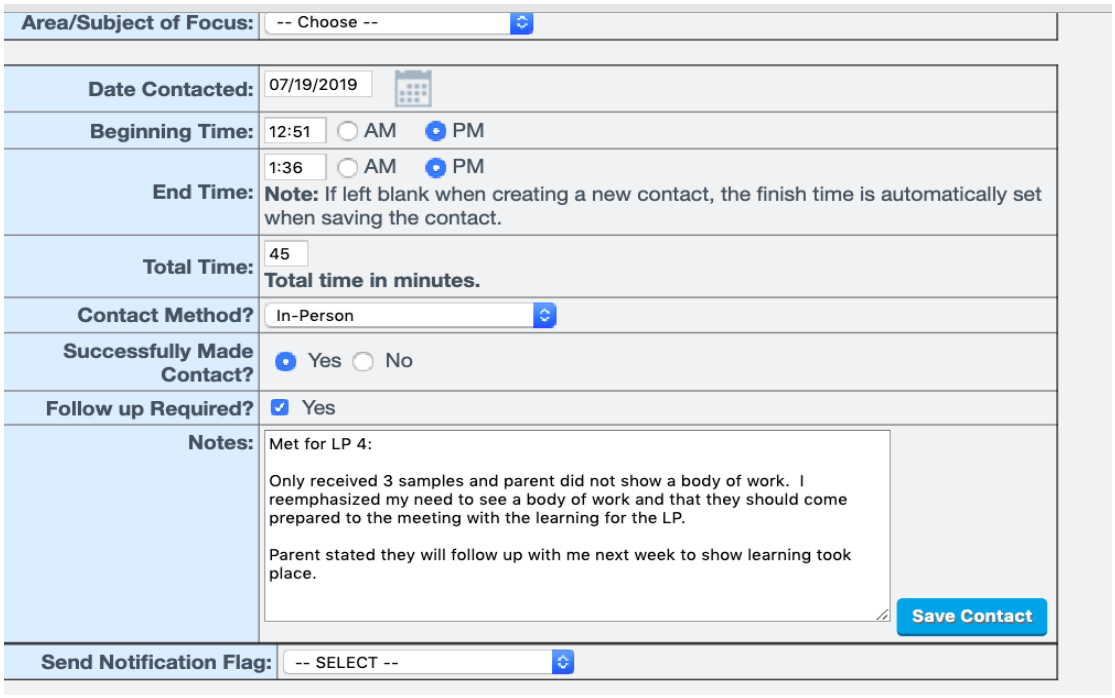


- Make sure the dates are set to the correct year and that your name is in the teacher spot at the top and then click "Update" in the lower, right-hand corner

❖ **You will see student names pop up at the bottom (scroll down), then select the student for whom you are creating a contact log for and click "contact now."**



❖ **On the Contact Information Page, you will fill out the portion with the date, time of contact in minutes, toggle the type of contact (in-person, phone, etc.), whether it was successful, etc. and put a description of what the contact was and if follow up is needed.**



- **Click "Save Contact"**

Student Notes in SIS:

A second key area to log information will be in the "Student Notes" section of the SIS. *This section will be used for things that need to be recorded and accessible to other staff members/administrators, <u>but are not necessarily interactions with the student or parent</u>.* Some examples of when to utilize the NOTES section: :

- Instances of Plagiarism (upload the plagiarized copy to the notes section; change to pdf if you have difficulty uploading)
- To Notate Ongoing Behavioral Issues
- Upload Content and Community Provider Agreement (CCPA), CHYA Opt Out Letters, and other PDFs
- Dates SSTs took place with the SST Doc uploaded
- *Important Information that any Admin should see when Logging into the student's dashboard in SIS (Parent Dislikes being on Video, Student Accelerated a grade on _____ (date), etc.*

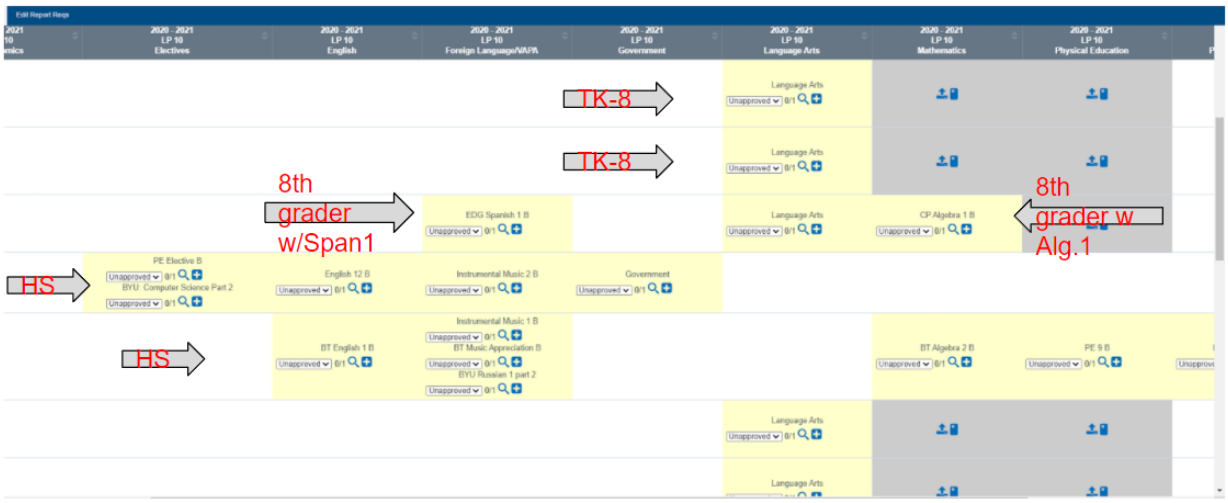
ToRs can access the Notes Section by clicking on the student name anywhere in the SIS, which will bring you to the student dashboard page. Scroll down to the *<u>Student Notes</u>* section of the student dashboard.

Loading Samples Into SIS

In addition to completing AWRs, teachers must also load samples into SIS. See the section "Sample Requirements " for more information about sample requirements, acceptable vs unacceptable samples and labeling.

1. Go to *Teachers* > *Compliance* > *Archive Compliance*
2. Make sure the following information is chosen:
    a. Report title: Work samples
    b. Include students "with or without Archived reports"
    c. Staff: your name
    d. Range: the correct LP
3. Choose "Generate Report" button
4. Watch this video on how to load samples:
5. You may load TK-8 samples in each section or load them as a single document into "Language Arts". They must be in the following order: ELA, math, science, social studies and PE
6. **High school level course samples must be loaded into their individual classes**.
7. Samples must be in either *jpeg* or *pdf* files.
8. Uploading options:
    a. Option #1: Upload from a computer or Google drive using the
    b. Option #2: Direct upload from your phone via text message: This works for single pages only.

Sample Archive Compliance:
Below is a sample screenshot from Archive Compliance after samples have been uploaded. Please note that high school classes, including those for junior high school students, are loaded into the individual classes. This will enable the HQTs to check student course work.



Sample Requirements

ToRs will also be required to **pull a sample from each content area course** and upload it into the student records system. These samples must contain the following:

1. Samples must be graded/marked:

a) Grades (6-12) Please include a letter grade, percentage, or fraction (all are okay) that indicates how well a student did on the assignment. If the student misses several questions on the assignment, but the page that is uploaded is free from error, it is advised to please write "page 1 of____," at the top so that it is understood the missed questions occurred on the pages not included. (Stickers, stars, checks, etc.. are not acceptable substitutes for a letter grade.) *

b) Writing Samples: The sample should have comments and corrections throughout the piece, along with a letter grade from the parent/teacher, showing they have read through it and provided feedback to the student. High school writing samples earning an A should include a corresponding rubric.

c) Grades (TK-5): Stickers, stars, checks or comments are acceptable forms of grading. A letter grade is NOT required. However, for math, students should show their work and wrong answers should be clearly marked. Ideally you will include the amount incorrect at the top of the paper, but again not necessary. (ie. -4 or 6/10)

*When labeling a sample digitally, please make sure the font and color is distinctly different from the font of the sample. This avoids confusion for the auditor.

2. Samples must show *as much student work as possible:*

a) Acceptable Samples:
   i) A picture of a science lab, accompanied by a lab write-up, detailing what the student learned.
   ii) Math homework in which all the student computations are shown (not just answers).

b) Unacceptable Samples:
   i) A picture of the student completing a lab with NO write-up
   ii) Multiple choice or T/F exams or worksheets
   iii) Maps or coloring pages *not* accompanied by a brief description;
   iv) Math homework which shows only the answers.

c) For very young students (TK and K), the parent may write what the child dictates. Have them use quotation marks to indicate it was a dictation. *Once the student is able, they should be encouraged to write independently*.

3. **Samples must be nonsectarian (no religious content)** - please double check the content, as well as the publisher at the bottom of the page.

4. **Samples should represent the student's work for that Learning Period.** The ToR, along with the student and parent should select something that truly reflects the student's abilities.

a) *Equally important is showing a progression of work.* For example, a 1st grade student may start with copy work samples and by the end of the year be writing original paragraphs.

b) Do not accept the same type of sample each Learning Period. For example, language arts includes writing, reading comprehension, spelling, etc. Do not upload a spelling test for each Learning Period sample.

c) A student's BEST work does not necessarily mean it will be an "A" on every paper. Get to know your students and what they are capable of and educate parents that an "A" is above grade level work.

5. **Samples should represent the student's original work** and may not be plagiarized in any way. (Please refer to the Plagiarism section of the Student/Parent Handbook for more information.)

How to Complete AWRs

AWR= "Assignment and Work Record"

AWRS are a digital list of work assigned to a student. It is, essentially, a gradebook with no grades. Teachers of Record create AWRs for each student to show assignments that work towards progress in their grade level standards and curriculum.

Virtual Teachers

Virtual ToRs will assign work from *FlexPoint* for each LP. The curriculum should be paced out prior to school starting, with AWRs already prepared in SIS.

Grades 1-6

Virtual ToRs for **grades 1-6** are responsible for completing AWRs in all 5 core subjects for each student.

7th and 8th Grade ToRs:

Virtual ToRs for 7th and 8th grade will complete AWRs in their respective subject area, as well as PE.

The ***Math/Science*** **teacher** will generally oversee 7th grade students, but teach both 7th and 8th grade students. They must complete AWRs for:

- Math and Science (7th and 8th grade)
- PE (7th grade)
- Advanced Math Courses, such as Algebra I (7th and 8th grade)

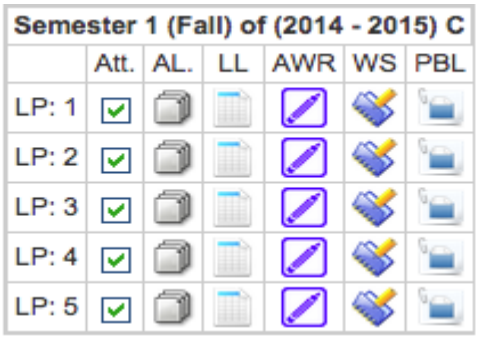
The ***English/Social Studies teacher*** will generally oversee 8th grade students, but teach both 7th and 8th grade students. They must complete AWRs for:

- ELA and Social Studies (7th and 8th grade)
- PE (8th grade)
- Foreign Language (7th and 8th grade)

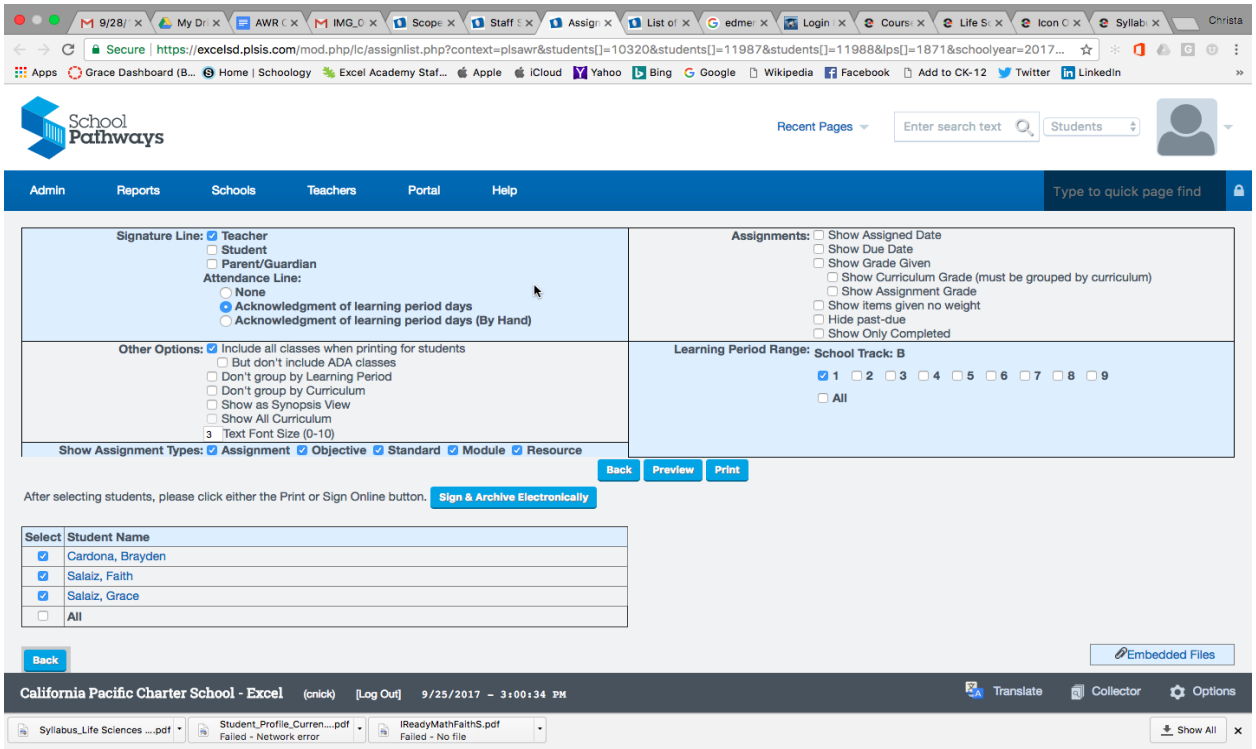
Archiving AWRS

After you have completed all of your AWR's for every student on your roster, you will archive the AWR's all at the same time. **This must be done AFTER you take attendance for your roster, as each student's recorded days of learning are listed at the top of the assignment record.**

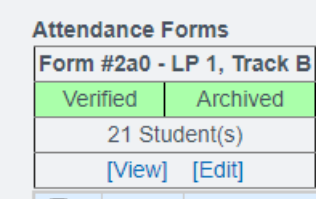
1. Click on the AWR button for the appropriate LP on your roster home page. (see photo below).



2. Click on 'Sign and Archive electronically'. Make sure the "teacher signature" box is clicked. **Parents and students do NOT sign the AWR.**



3. SIS will create a document version of your student's AWRs in alpha order. Scroll through all of your students and make sure that the AWR's are showing up for all subjects.
4. Sign each AWR with your signature and your typed name. Use the same date that you signed your attendance as the signature date.
    a. Hint: You can use the 'Attendance Forms' section on your dashboard to see your signature date: Click 'view' to remind yourself of the date it was signed and archived.



5. At the top of the AWR you want to see the number of days the student was present. For example:
    a. "*The number of attendance days possible for this student's learning period is 19. In my professional judgment, the student has completed work that has a value of 19.*"
    b. You do not want to see the value '0' here. If you see '0' here that means you have not claimed attendance yet. AWRs are to be completed and archived after attendance has been claimed.
6. If you see the correct number of days, choose 'Send Invitations/Submit Agreement' in the bottom right corner after the last AWR.

Commonly Asked Questions

Q: **Should the AWR show all objectives and assignments for each Learning Period?**
A: Yes. All objectives and assignments noted on the pacing guide should be noted on the AWR. Remember that AWRs are written in the future tense by showing what the student is planning to complete. The purpose is to establish the intended learning and workload for each student per LP. Ex: Student will complete lesson 6.

Q: **What if a student only completes a few of the total assignments?**
A: Place a custom note (see below).

Q: **Can the uploaded sample reflect a student's best work even if they are failing a course? (ex. Uploaded sample earned an "A" but the student earned an "F" in the course.)**
A: Yes, but ideally the sample should reflect the grade they have in the course. The best way to ensure this is the case is to choose an assessment for each LP for your class. If the lower grade occurred because the student failed to turn in assignments, a comment on the AWR should show less work was completed, indicating the purpose of lowering the grade.
Ex: "Student completed 2 out of 10 assignments." ~which would be an "F"

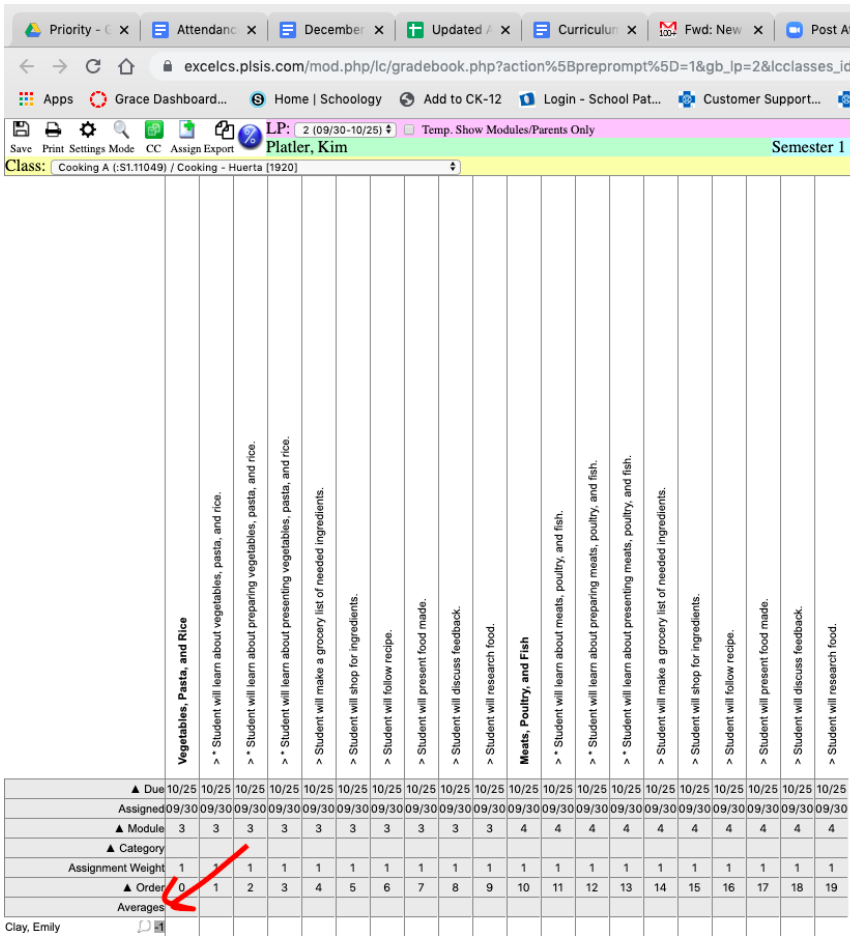
Q: **Should I note a lack of work completion on the report card?**
A: The report card should include a line about why the grade was lowered. Ex: Student only completed 20% of assigned work, resulting in a lower grade and/or failing of the course.

How to Complete AWRs for Little to No Assignments Completed for the LP

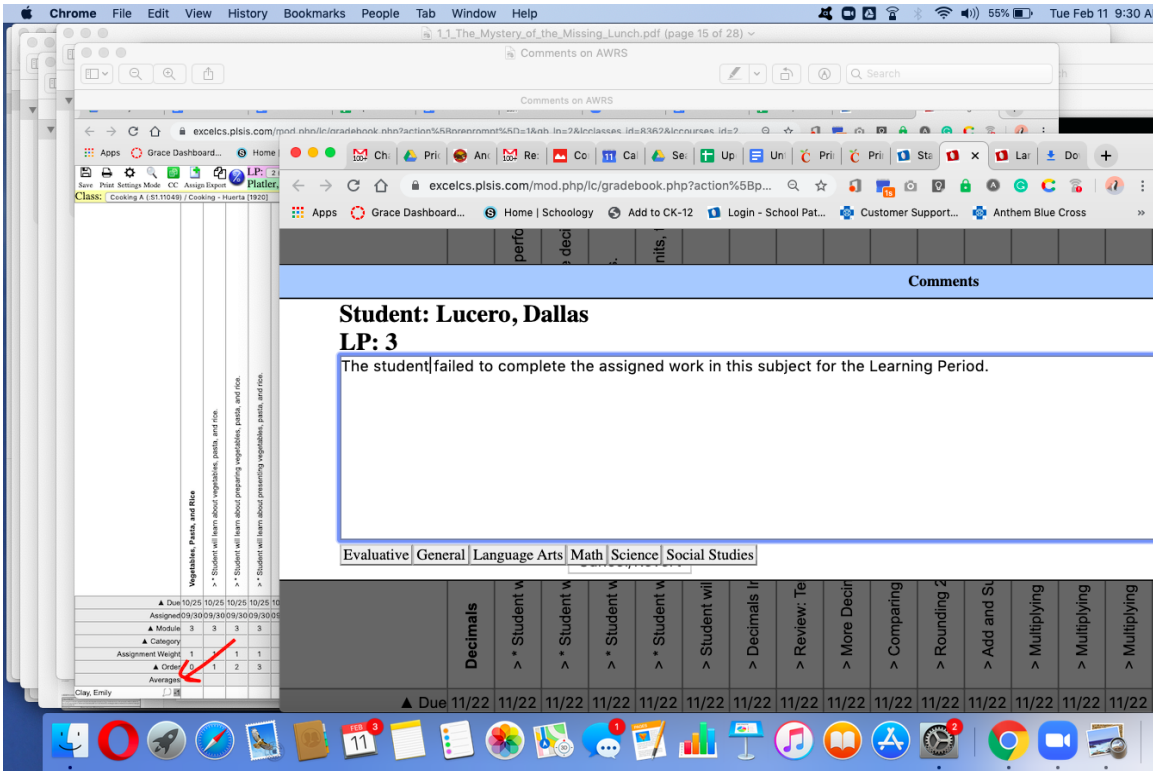
1. Choose assignments for your AWRs that represent the 20 days of learning the student SHOULD have completed for the LP.
2. Then, you will write a comment (see below for instructions) for each subject area affected that reads: "Student failed to complete assigned work in this subject." OR “Student completed ____% of the assigned work for this subject.”

How to Include a Comment on AWRs:

1. While in the AWR for the class with no samples or very little work completion, click on the little speech bubble at the bottom of the assigned AWRs next to their name.



2. A box will open and you will type the comment in the box **for each subject that you received little to no work.** If you receive work in one subject, you will keep that AWR as normal.



Withdrawal Process

(During the School Year-First Day of School Until Last Day)

Summer Months: No withdrawal form is needed for students that decide not to enroll during the **summer** months Excel is not in school.

Simply notify:

1. **Registrar**: Previously enrolled students
2. **Admissions:** New Students with No Previous Enrollment

Withdrawals During School Year:

Meet with the parent one last time, if possible, to collect:

1. Withdrawal Form: Have the parent sign the withdrawal form that is located in the shared drive. Or, click the link here.
2. Collect non-consumable books and computers purchased with Excel student funds.
    a. If parents refuse to return items or they are not responding to your requests, please send a list of the items not returned to Cori in the Registrar's Office. She will follow up with the family to obtain the items.
    b. Cancel any outstanding orders in OPS.
3. Attendance Roll (Grid) Log:
    a. Send the parent the attendance grid log to sign **with only the dates that the student was actively enrolled checked off**. The last day checked off should be the date of the withdrawal.
    b. You can also print the grid log if the parent is meeting with you and wishes to sign it in person. The signature date on the Grid Log will be the date of the withdrawal or after (typically within one week if you are meeting in person).
4. Collect Work Samples for the days enrolled during the LP:
    a. Reach out to Christa Nick and Noel Park (Registrar@excelacademy.education) if you are unable to take full attendance.

Engagement and Re-Engagement Programs and Policies (AB130/Ed Code 51747)

Recent changes to Ed Code 51747 through AB130, added July 2021, require independent study programs to outline, offer, engage and re-engage students in synchronous instruction and live interaction. These guidelines and Excel's program adaptations to meet these guidelines are listed below. This new legislation has made programming fluid and may change as needed.

Virtual Path: Students in the **Virtual Path** attend class Monday-Friday and engage in learning activities that are synchronous and asynchronous throughout the day. Because students have some form of live, synchronous instruction every school day, engagement is determined by attendance taken by the classroom teacher or participation in another school sponsored activity, such as school-wide testing or field trips. If students do not attend 60% or more of the school days within a Learning Period (LP), they will be sent re-engagement letters as well as be subject to Progress Improvement Notifications.

**Note: Students/Parents that wish to attend a school sponsored field trip must notify the ToR in advance and be in good academic standing.*

Instructional Funds, Materials, and Content & Community Providers

Instructional Funds Information and Guidelines

Each California state student generates funds by his/her average daily attendance (ADA). The funds are budgeted for use as outlined in the school's Local Accountability Plan (LCAP). Guidelines are as follows:

- Excel Academy may not provide any funds or other things of value to the pupil, or his or her parent or guardian, that a school district could not legally provide to a similarly situated pupil of the school district, or to his or her parents or guardian.
- Excel Academy may only receive funding for the provision of independent study to pupils who are residents of the counties the school serves.
- The Instructional Funds (IF) are appropriated for education purposes to deliver the student's educational plan. The funding may only be spent on appropriate educational materials for the enrolled student. They may not be used to provide educational materials/admissions for siblings or parents or anyone else not enrolled in Excel Academy, or for materials not applicable to the enrolled student's educational plan.
- IFs may be used on educational materials or services that are approved by the Teacher of Record (ToR).
- These funds can NOT be used for items designated in the Policy for Criteria of Materials or activities/product/instructors disallowed in the Conflict of Interest Policy. They also cannot be spent on any item or activity that requires payment for transportation. Excel Academy does not pay for transportation, as we receive no transportation funding. For our students, core learning occurs remotely and anything the parent/guardian/student chooses to do outside of their home needs to be within the realm of what transportation they can and want to arrange/provide.
- The amount of funding is based on the ADA calendar the state uses to appropriate school funds. The IF amount is prorated and differs depending on the student's enrollment date.
- Students who are enrolled on the first day of the school year will have the maximum amount of appropriated funds when planning their educational program. Students who enroll later in the year will have less than the maximum amount of appropriated funds with which to plan.

- For the 23/24 school year, the maximum IF appropriation for each student on the personalized path is $2,900 for TK-8, and $3,400 for Grades 9-12; and 1-8 virtual path students is $1,600, for those students who are enrolled for the entire 175 school days. The IF's are placed into the fund account in multiple disbursements throughout the school year. No school funding is provided directly to parents or students for any purpose.
- All families must have the **Content & Community Provider Agreement** on file with their TOR before being allowed to request purchase orders
- Excel Academy reserves the right to determine what services and materials will best promote the student's academic achievement. IF spending ought to be considered as being ultimately at the school's discretion.
- April 12, 2024 is the deadline for orders to be submitted and approved in OPS. It is vitally important to place orders earlier than the deadline. After the deadline, no purchase orders can be submitted. IFs do not roll over from year to year. If the IFs are not used by the deadline the parent will no longer have access to them.
- IFs should be spent evenly throughout the year. All orders containing excessive quantities of anything will be reviewed by the Business Services Purchasing Coordinator, Business Services Manager, or administration. It is imperative that the parent and ToR ensure that students receive services and materials throughout the year.
- Students must reasonably be able to use all items by the last day of school. If the Business Services Department (also called Student Services) does not believe all items can be used in time, items will be reviewed and non-essential items may be canceled from the order.

Management of Instructional Funds

The parent/guardian and the ToR will work in cooperation to evaluate the most effective use of funds to produce the best possible outcomes in terms of student learning. It is the ToR's responsibility to help each family manage their IF account within the guidelines set forth. Please be mindful that while these funds are allotted to each student, the funds remain part of the Excel Academy's budget and the items purchased with these funds remain Excel Academy's property. It is the ToR's responsibility to make sure that each family does not spend in excess of their allotted IFs. Parents can obtain information on their IF balance at any time by contacting their ToR or logging into their access point in OPS. Parents are encouraged to assist in determining the allocation of these funds, however, the ultimate responsibility for ethical and professional distribution of these funds is the ToR's. This responsibility is not shared and the ToR is responsible to ensure that all core curriculum has been put in place prior to requesting purchase orders for extracurricular activities. The administration will mediate any disagreements between parents/guardians and ToRs regarding IF purchases.

Criteria for Materials That Can Be Purchased with Instructional Funds

Excel Academy receives funding from the state to support student learning and progress toward the state's standards. Therefore, IFs need to be spent on educational items that meet the criteria below. ToRs will consult with the Business Services Purchasing coordinator for additional clarification on acceptable IF purchases. The list below should not be considered as all-inclusive

and Excel Academy reserves the right to the interpretation of the below criteria and to exercise final judgment on how IFs will be used.

Here are some examples of things that can be purchased with IFs:

- CORE educational classes
- CORE materials and curriculum
- CORE tutoring
- Elective educational classes
- Elective educational materials/supplies
- School supplies
- School sponsored field trips
- Music lessons
- Physical education classes

General Criteria:

- Educational curriculum ordered is appropriate for the student's courses and learning plan.
- Materials must be used to meet state and school standards for the student for whom the materials are being purchased.
- All materials must be non-sectarian and non-denominational.
- As a general rule, **basic, economical items/models must be selected**. If the student requires a higher-priced, less than basic item/model, a statement from the ToR justifying the purchase may be required.
- School & office supplies adequate for learning basic course skills (paper, pencils, etc).
- Materials for a documented educational project: fabric, wool, yarn enough for one project (exception: no food purchases allowed.) **ToRs are responsible for monitoring the quantities of items purchased.**
- Educational software to instruct and enhance learning in a subject area.
- Materials must not expose the ToR or student to danger or serious injury.
- Tracking forms & educational plans are required for certain items.
- School sponsored field trips.
- No more than 2 black printer ink cartridges and 1 color ink cartridge per semester - Printer must be an Excel purchased printer.
- 1 Toner Cartridge per semester.
- Only 2 reams of paper are allowed per semester per student.
- Organizational items if only intended to be used by the student explicitly for the organization of school supplies.
- Instruments are to be rented out by an approved vendor. If a rental instrument is not in stock, proof needs to be submitted to Business Services that it is not in stock first, in order to purchase an approved instrument. Instruments need to be Purchased no later than January 30th.

Disallowed Items: (Please see complete list here)

If a ToR inadvertently orders materials from this list, the ToR will collect the materials and return them to school administration.

Disallowed Items by Category:	Household Furniture	Technology	Personal Items	Kitchen	P.E. Equipment	Art	Outdoors	Music	Dangerous Items
	Furniture	Computer Parts	Toys or items with no educational value	Popcorn Popper	Skis	Epoxy/Resin	Grass Watering Kits	Tuner	Knives
	Storage	Accessories & Software(1)	Personal Hygiene	Trays	Bicycles	Cricuts & Accessories	Garden Ponds	Instrument Stools	Poisons
	Storage containers	Phones	Costumes	Plates	Tricycles	Vinyl	Swimming Pools	Drums	Darts
	Picture Frames	Dictation Equipment	Uniforms	Silverware	Scooters	Heat Transfer Paper	Watering Cans	Electric Guitars	Sharp Items
	Footrest	TV's	Clothes	Food Coloring	Yoga Mats	Wax	Sharp Gardening Kits/Tool Set	Amplifier	Bow & arrows
	Chairs	3D Printers & Filament Refills	Makeup	Basic Kitchen Items	Weights	Wax Stamp Kits	Already grown plants	Cello	Weapons
	Lapdesks	Ink (2)	Jewelry	Kitchen Scale	Gloves	Hot Glue Guns	insect lore (1 per semester)	Harp	Welding Equipment
	Iron	Coding Robots over $80+	Backpacks	Disposable Gloves	Mitts	Pottery wheels	Bubbles/Bubble Machines	Piano	Explosives
	Bookshelves	VR Goggles	Power Tools	Chef Hats/Hair Nets	Bats	Large Easels		Keyboard over $75	Weedkiller
	Washer/Dryer		Wrapping Paper	Aprons	Rackets	Dried Flowers			Insect Repellant
			Gift Bags		Helmets				Fertilizer
			Soap Making Kits		Golf Clubs				
			Candles		Paddleboards				
			Fingertip Moisturizers		Gymnastics Equipment				
			Hairspray Bottles		Hockey Equipment				
			Balloons		Pogo Sticks				
			Rolling Whiteboards (3)						
			Household Cleaning Supplies						
			Hand Sanitizers						
			Fidget Toys						
			Rubix Cubes						

- (1) Accessories (ie. Tablet covers) & Software cannot be purchased for non-Excel-owned technology
- (2) Printer ink can only be purchased for an Excel purchased printer (No personal printer ink allowed)
- (3) Whiteboards must be within 48 x 36 inches
- (4) Must be taking an ETL/VCI Music Class & Needs to be Returned at the end of School Year
- (5) Need to include an explanation for sticker purchase in the internal notes.

- (6) Please explain the reason or need to purchase knitting materials, cannot be purchased in excessive amounts

Sectarian Materials

School materials cannot have sectarian/religious content. The ToR will ensure sectarian/religious materials are not ordered with IFs

Technology Options
At Excel Academy, we value the use of technology as a powerful educational tool. Therefore, we offer our students a variety of technology options for purchase with IFs. Please be aware that, like all school materials, computers ordered with IFs are property of the school and must be returned when a student's enrollment in the school ends.

- Environmental waste fees and warranties for school owned computers must be purchased with IFs.
- All families must have the **Excel Academy Technology Lease Agreement** on file with their ToR, **PRIOR** to purchase, to ensure internet safety for students and that internet and computer policies and procedures are followed.
- All accessories and software purchased must be only used for devices issued by Excel Academy. Excel Academy does not assume any liability for accessories and software installed on or used with non-Excel Academy issued devices.
- *Please note that computers don't come with any additional software (e.g. Microsoft Word).
- A list of available technology options can be found here. All computer orders must be placed according to the options listed on the technology options.
- One computer or tablet per student.

Community Provider
An approved community provider is a provider that supplies services paid for with IFs. Approved services include but are not limited to: class fees, material costs (if approved as a materials provider), enrichment activities, community involvement activities, core subject assistance, and other educational services from our current approved vendor list. All approved community providers must provide proof of background check clearance from the Department of Justice, proof of commercial liability insurance, and complete our pre-approval process.

The list below should not be considered as all-inclusive and Excel Academy reserves the right to interpretation of the below criteria and to exercise final judgment on how IFs will be used.

****Please note that all service orders must be placed 10 days prior to the start of class to allow time for processing.****
Excel Academy does not pay for registration fees or membership fees.

Community Provider Policy
- If instructional funding is to be used for approved services, all school policies and procedures must be followed.

- Prior to a student placing an order for a community provider, who is supplying non-core for TK - 8th grade students elective activities with instructional funds, core curriculum must be in place and the ToR must confirm that the student is making adequate progress with respect to grade appropriate standards.
- The services must be approved by the ToR, the purchase order (PO) must be submitted and received by the community provider prior to the event/activity.
- Excel Academy will not, under any circumstances, reimburse parents or ToRs for a student's participation in any services.
- No sectarian or denominational instruction may be given in any course/activity paid for by the school.
- The community provider must be approved before the school will pay for any services.
- School funding may only be used for students currently enrolled in the school, during the school year.
- The school does not pay for season passes, memberships, and recital fees.
- Excel Academy cannot pay for uniforms, belts, costumes, makeup, and/or ticket costs.
- All non-core/elective VCIs over $500/mo must have a ToR note on the PO stating the student is doing well academically and has a core curriculum in place.
- Any orders placed after the first of the month for that month MUST be prorated to only pay for services provided 10 days after the order was placed and must include the service start date on the description line. Per the Content & Community Provider Agreement, Excel Academy will not pay for any services rendered prior to POs being created, including the 10 day approval time frame. For example, an order placed on 9/10/2022 must be prorated for services given on or after 9/20/2022

Field Trips

Field Trips are group activities that are organized and overseen by the Field Trip Coordinator and school representatives. Field trips are a great, fun way for students and parents to join other students while pursuing their individual learning plans.

Field Trips are school activities for which a parent can decide if their students and family would like to attend. Students' participation in a trip is paid through their IFs, and parents and siblings will pay out of pocket.

Subscriptions

Excel Academy allows students to order educational subscriptions from CCPs like, Kiwi Crate, and History Unboxed. The following guidelines apply to subscriptions purchased in the 23/24 school year.

- 12 month subscriptions must be ordered between September and December 15.
- 6 month subscriptions can be ordered between December 15 and February 28.

After February 28 all subscription orders must be for 3 months or fewer.

Gardening

Some providers offer gardening materials to students. The following restrictions apply to gardening items purchased in the 23/24 school year.

- All items must be basic in nature.
- Only enough materials for one educational project are allowed per semester.
- Educational projects must be documented through learning samples and monitored by the ToR.
- Items like seeds, bulbs,and soil are allowed but must be basic in nature.
- Gardening tools may be ordered but cannot be sharp or dangerous to the student, and must be basic in nature.
- Additional items such as composters, sprouting trays, label sticks, and small pots may be ordered, but must be basic in nature.
- No items that students will wear, such as gloves or aprons, may be ordered.
- All equipment must be deemed fit for child educational gardening use.
- No furniture is allowed.
- No already grown plants are allowed -- seeds only.
- No potentially dangerous items such as weedkiller, insect repellant, or fertilizer.

LEGO® Education

LEGO® provides educational kits that are subject to the following guidelines in the 23/24 - school year:

- All orders must be placed for kits from the LEGO® Education Website.
- All orders must have clear educational value (no minifigure kits allowed).
- Any LEGO® Education orders must be documented through learning samples monitored by the ToR, and documented on the AWR.
- Kits must be grade-level appropriate.

Cancellation Policy

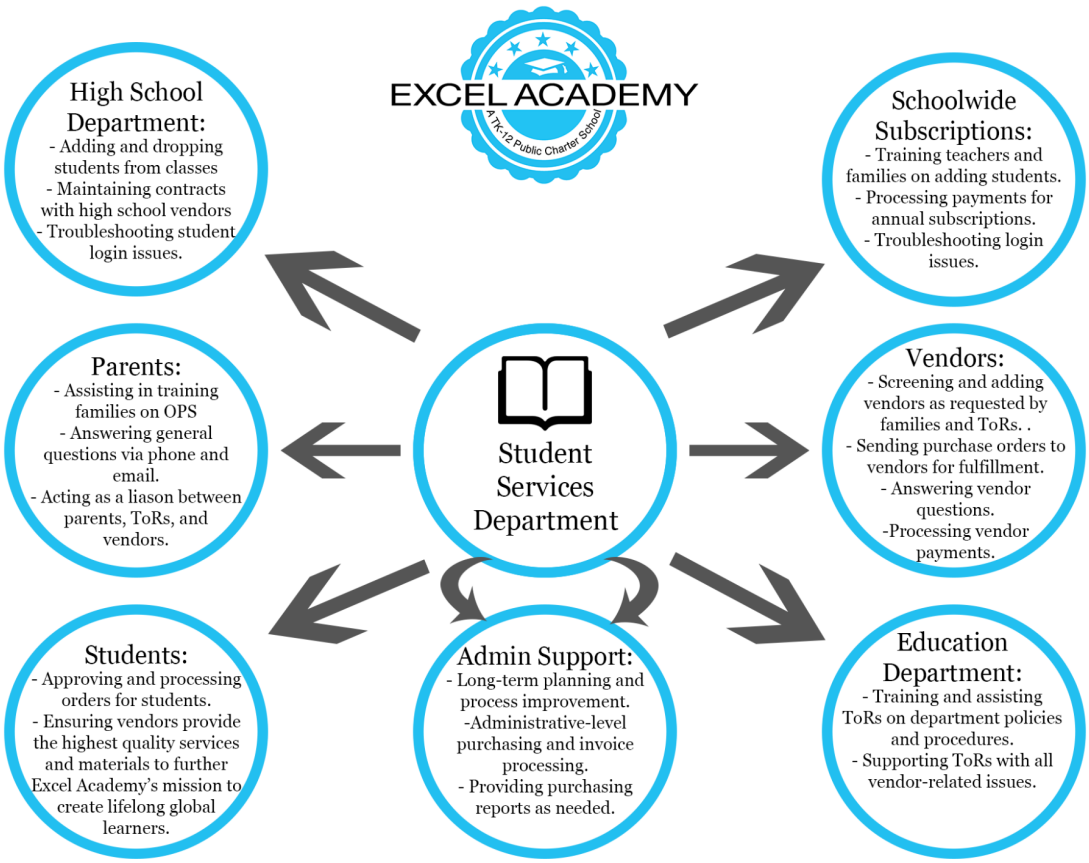
We cannot cancel an EMR order after they are processed and sent to the Content Provider. Once materials are requested, the Student Services Department will order them and they cannot be canceled. If an order has not been processed and is still in "Pre-Pending Status," the parent can cancel or edit the purchase order in OPS. For VCI orders, Community Providers **must** be notified, by the parent or guardian, of cancellation prior to orders being canceled in OPS.

Disallowed Educational Activities

The following activities are examples of disallowed activities that cannot be paid for with IFs since they impose high liability and/or political risk to the school. CCP's who provide the below services will not be approved.

- Religious, sectarian, or denominational services or materials
- Scuba Diving
- SkyDiving
- Water / Jet Skiing
- Skiing / Snowboarding
- Aircraft-related activities
- Behind the wheel driver's education
- Any motorized vehicle operation
- Extreme sports that expose the student to unnecessary risk: outdoor rock climbing, white water rafting, paragliding, etc.

ORDERING INSTRUCTIONS



Content & Community Provider (CCP) List Located on Website

Families can log in to their online profile to search for appropriate CCPs in their area.

If a parent is *only looking for local classes/instructors (community providers)*, we have a fantastic new app for that on our website: Map Search

Please make sure your families are aware of these search tools! They can both be found under the CCP tab on our website.

Glossary of Terms

- EMR: Educational Materials
- VCI: Educational Services
- OPS: Online Purchasing System. The system we use for ordering educational materials and services.
- Red notes: Individual guidelines for placing orders.
- Internal notes: Notes placed on orders after they have been created. Method for admin and teachers of record (ToRs) to communicate about a specific order.

- Consumable items: Items that (A) are under $30 and/or (B) cannot be reused by another student. Examples of consumable items include: workbooks, pens, paper, pencils, printer ink, etc.
- Non-consumable items: Items that (A) are over $30 and/or (B) can be reused by another student.
- Purchase order status terms:
    - **Pre-Pending:** Order has been placed by the parent and is *pending review by the ToR*.
    - **Pending:** ToR has carefully reviewed the order to ensure that the items or services being ordered correspond to Excel Academy guidelines and selected "Pending," OR the ToR has placed the order on behalf of the parent *(orders placed by ToR are assumed to have been carefully reviewed)*.
    - **Approved:** Order has been reviewed and approved by the Student Services Department.
    - **Processed:** Order has been sent to the CCP for fulfillment.
    - **Received Partial (EMR ONLY):** ToR has indicated that some, but not all, of the items on the order have been received.
    - **Received Fully (EMR ONLY):** ToR has indicated that all items on the order have been received.
    - **Invoice Matched:** Student Services Department has received the invoice from the content or community provider and matched the order in OPS to match what the charge shows on the invoice.

Content & Community Provider (CCP) Agreement

A signed copy of the Content & Community Provider Agreement must be on file before the ToR can begin placing purchase orders for services. **As of 2023/24, all new families have signed this document during the registration process. Returning families need to go back into their student's RegOnline account to re-sign, or you can send them the paper version.** This is critically important! The ToR must go over the CCP Agreement carefully with each parent before signing. If the parent doesn't understand their role in requesting service purchase orders correctly, it will cause problems for the ToR, the Business Services Department, the community provider, and the parent. (Parent must contact a community provider to see if they are able to accommodate the student *before* placing an order. The community provider will then hold a place for the student.)

The ToR may be asked to produce a copy of the signed Content & Community Provider Agreement at any time.

ToR RESPONSIBILITY

While families are able to place orders, and the Business Services Department screens each for compliance, *it is ultimately the ToR's responsibility* to ensure that all items correspond to the Ordering Guidelines and that families adhere to the CCP Agreement. Keeping in compliance with these guidelines is critical to ensure both our students' academic success and the longevity of our school. Read the guidelines carefully, and follow all instructions listed in the red notes.

NON-CORE CURRICULUM ORDERING

Student academic achievement is of paramount importance to Excel Academy, and it is the ToR's responsibility to ensure that core curriculum is in place before allowing families to place orders for electives and other non-core materials or activities. It is the duty of the ToR to exercise their best judgment in approving all orders.

EMR ORDERS

Placing EMR Orders

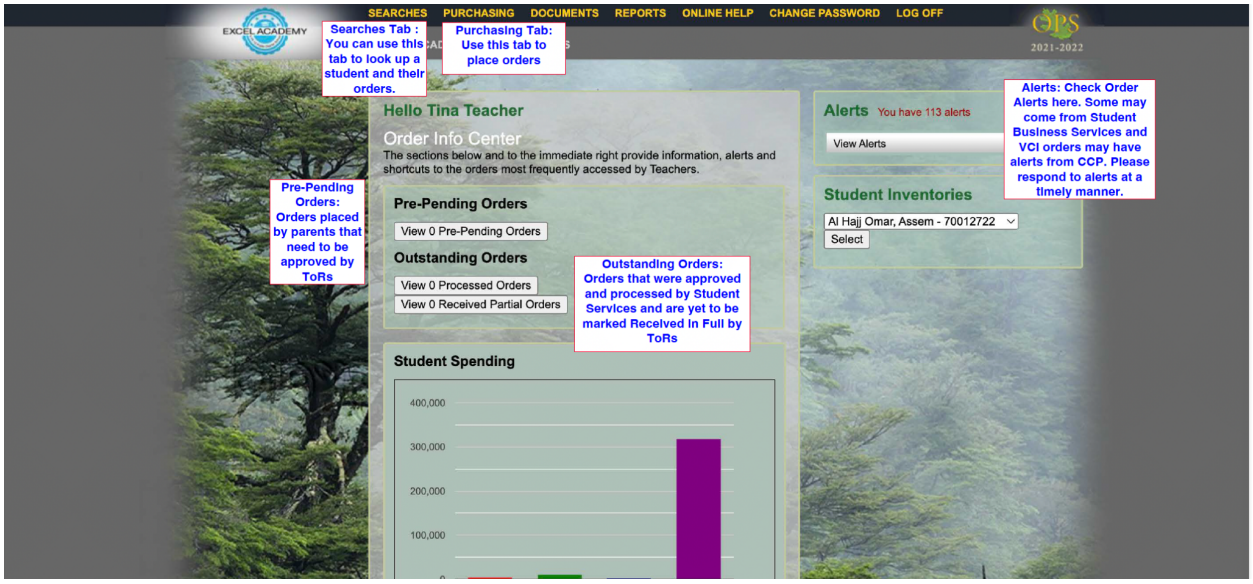
To place an EMR (Educational Materials) order you must first review the order for content and appropriateness of educational material requests. Look up each item on the provider's website and confirm the item number, description, cost and availability. You must verify that items do not contain religious content as well as the cost of the item.

**Please note:

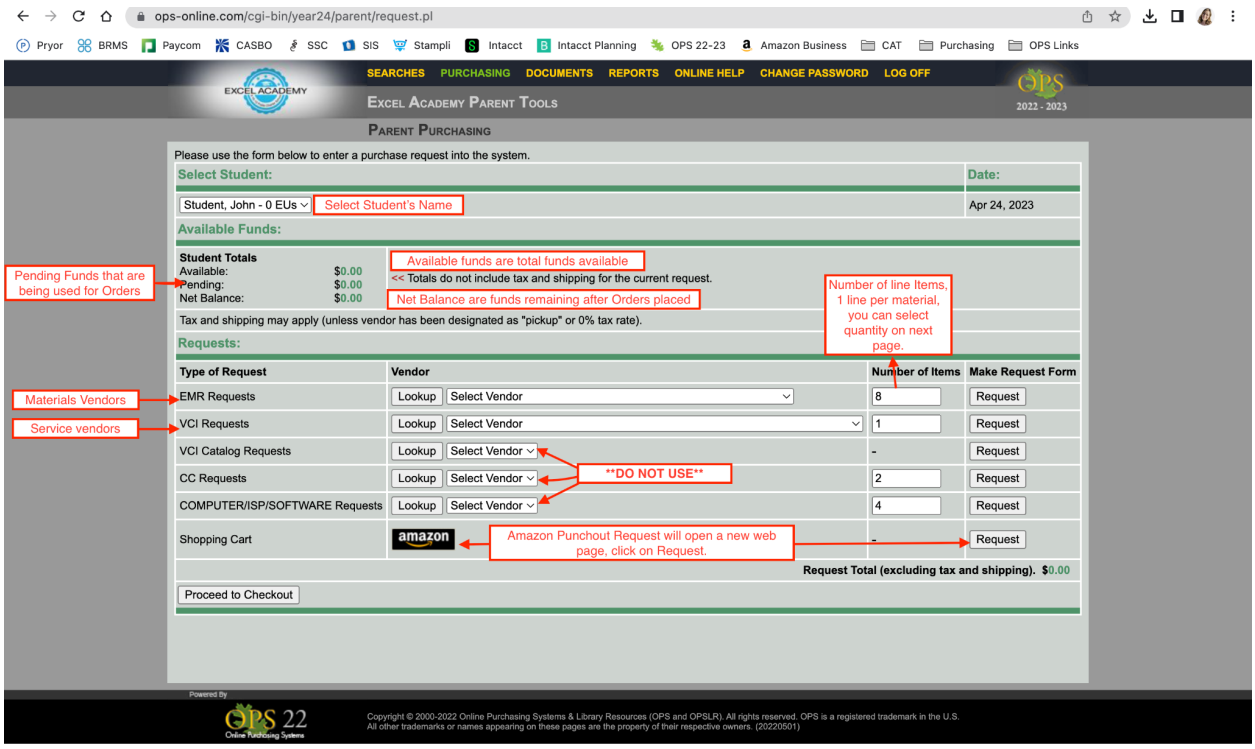
- 12 month subscriptions must be ordered between September and December 15.
- 6 month subscriptions can be ordered between December 15 and February 28.
- After February 28 all subscription orders must be for 3 months or fewer.

Training video: ToR EMR Training

1. Log in to OPS. The dashboard will show any applicable alerts and orders that need to be marked received. ***OPS uses the word vendor which we refer to as Content Provider or Community Provider***

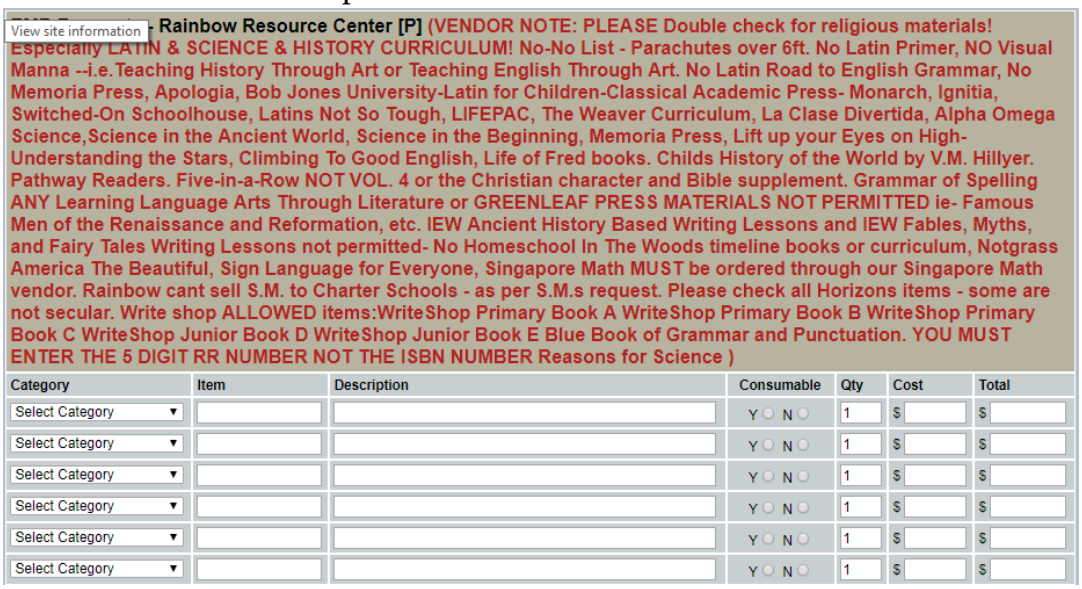


2. Click on the **"Purchasing"** tab on the top and a list of available content and community providers will be shown. Select the student from the "Select Student" drop-down list. You will see the available funds for the student there. You must be sure there are enough funds in the account to cover the order plus about 30% for shipping,handling and tax. These costs are estimates and will be adjusted when we receive the invoice.



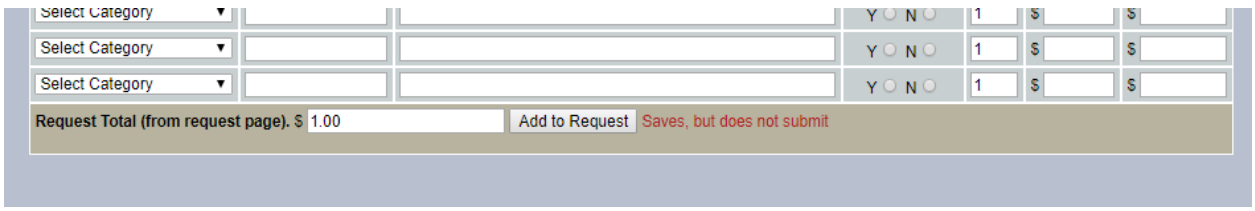
3. Select an EMR (content) provider from the first drop-down menu and indicate the number of items needed on the purchase order. Number of items in this case are item lines not quantity. You can change the quantity on the next screen. **If you forget item(s), you may add additional lines after completing instructions #1-6.** Then press "Request".

4. First, read any **red notes** on the top of the page. Not every provider has red notes. Make sure you follow the red notes for each provider that has red notes. See below:

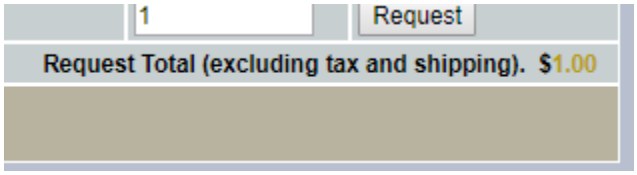


This is how the red notes for Rainbow Resource appear when attempting to place an order. Please ensure all orders follow these guidelines. Following proper ordering procedures is essential to your families receiving their items in a timely manner.

5. Next, click "**Select Category**" to access the drop down menu. Choose the most appropriate category for each item. Fill in "**Item Number**" with the item number for the product. If there is no item number available enter 0000. For **"Con."** (consumable) you must click **"Y"** or **"N"**. **All items under $30 may be marked consumable. Items that cost more than $30 that can be used by another student must be marked nonconsumable.** For **"Qty"** (quantity) enter the correct number. For **"Cost"** enter the cost for the individual item. You must verify the cost on the vendor website. OPS will calculate the total cost, but note that this is a subtotal and shipping/tax has not been factored in during this step. When complete, click on **"Add to Request"**.

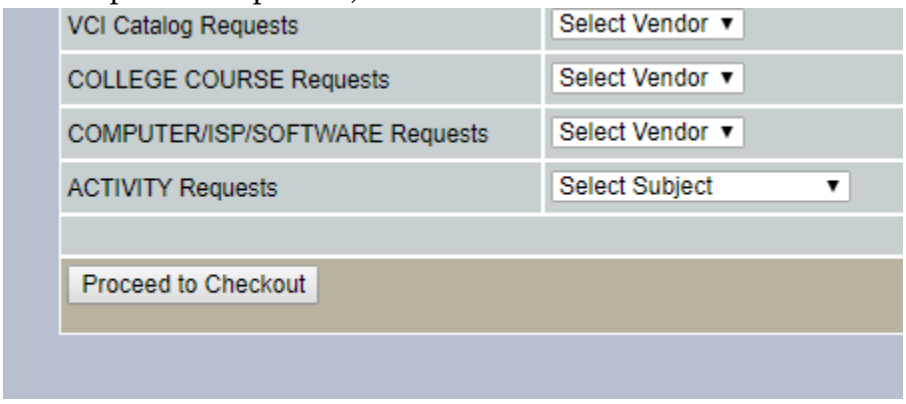


6. Pressing "Add to Request" **will not create the purchase order**. It will save that individual order. You can see the amount previously requested at the bottom of the request form once you return to that page.



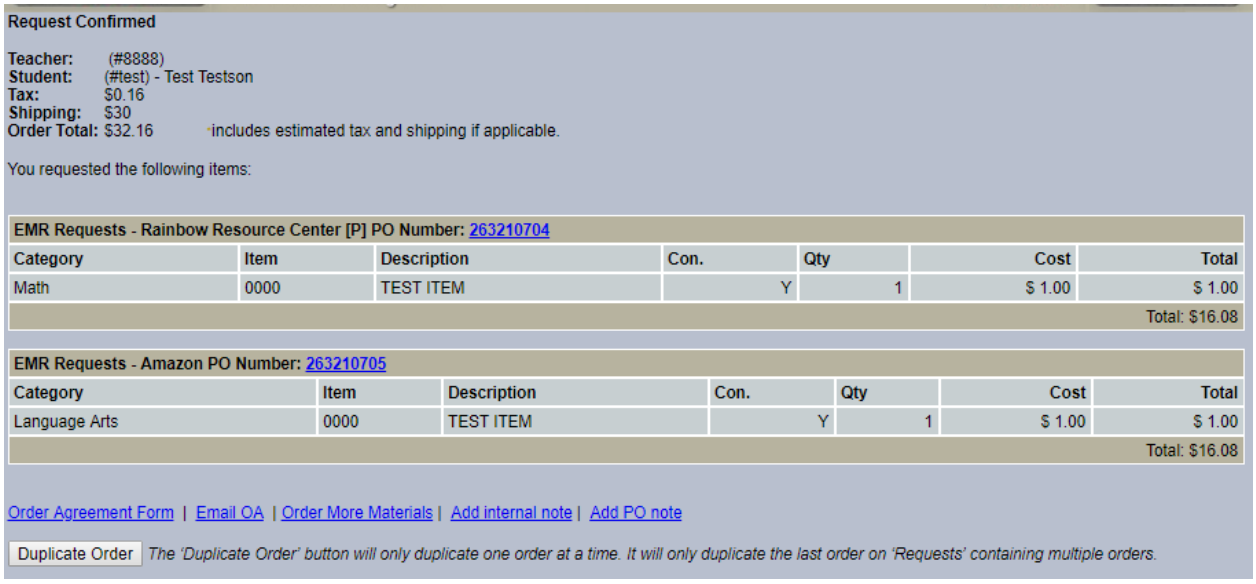
7. If you have another order that must be placed for that student you may follow steps 3-6. Additional items/lines can also be added to an order that is still in the Request 'cart' by repeating steps #3-6. Avoid combining VCI and EMR orders into the same 'checkout' as the EMR orders will appear on the VCI OA.

8. Once you have completed this process, click "Proceed to Checkout."



8. On the checkout screen, you will see a summary of the individual orders you have placed. Review your orders to make any last-minute corrections (you **must** press "Update Order" for the changes to be saved), then press "Confirm Request."

9. You will then be presented with the confirmation screen, where you can click on the purchase order numbers to see the PO details.



Request Confirmed

Teacher: (#8888)
Student: (#test) - Test Testson
Tax: $0.16
Shipping: $30
Order Total: $32.16 *includes estimated tax and shipping if applicable.

You requested the following items:

EMR Requests - Rainbow Resource Center [P] PO Number: 263210704

Category	Item	Description	Con.	Qty	Cost	Total
Math	0000	TEST ITEM	Y	1	$ 1.00	$ 1.00
						Total: $16.08

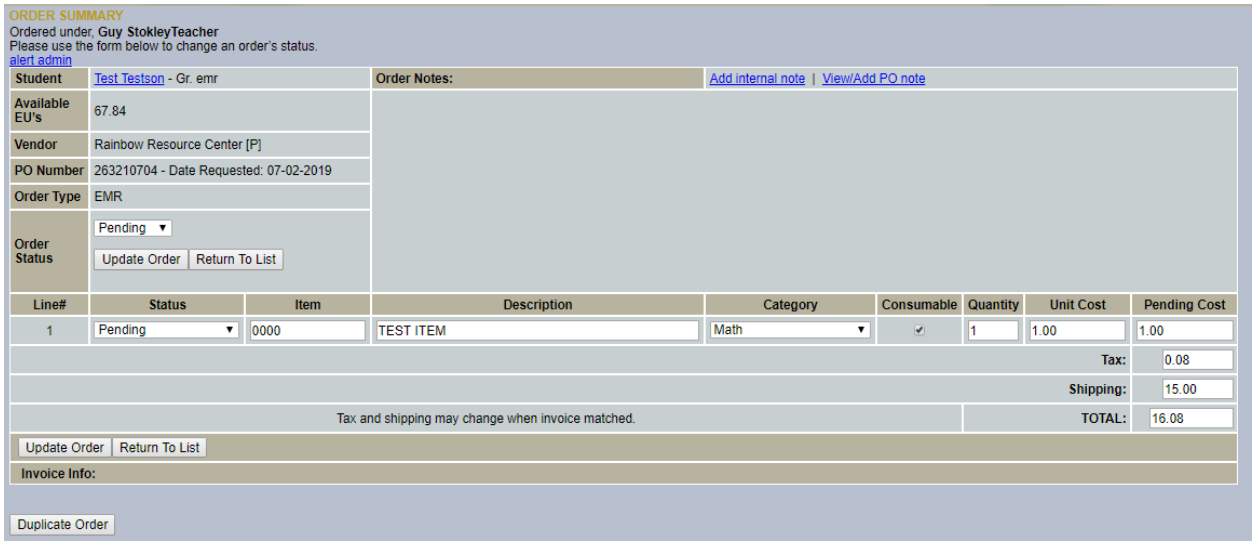
EMR Requests - Amazon PO Number: 263210705

Category	Item	Description	Con.	Qty	Cost	Total
Language Arts	0000	TEST ITEM	Y	1	$ 1.00	$ 1.00
						Total: $16.08

Order Agreement Form | Email OA | Order More Materials | Add internal note | Add PO note

Duplicate Order *The 'Duplicate Order' button will only duplicate one order at a time. It will only duplicate the last order on 'Requests' containing multiple orders.*

PO details:



ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin

Student	Test Testson - Gr. emr	**Order Notes:**	Add internal note | View/Add PO note
Available EU's	67.84		
Vendor	Rainbow Resource Center [P]		
PO Number	263210704 - Date Requested: 07-02-2019		
Order Type	EMR		
Order Status	Pending ▾ Update Order Return To List		

Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pending ▾	0000	TEST ITEM	Math ▾	☑	1	1.00	1.00
							Tax:	0.08
							Shipping:	15.00
			Tax and shipping may change when invoice matched.				**TOTAL:**	16.08

Update Order | Return To List

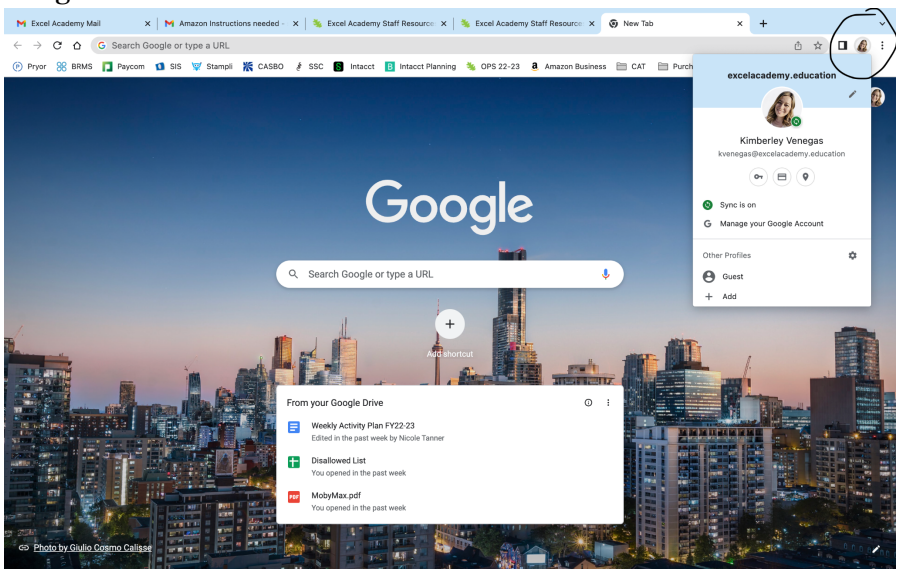
Invoice Info:

Duplicate Order

10. On this screen you may edit any changeable fields while the order is in the "Pending" stage. If you have a question for Admin, you may send a note to the Business Services Department by clicking to add an internal note. An example would be if you want items shipped directly to you, the ToR first - you would add a note to ship to you ~ Otherwise the order will ship directly to the family.

How to place an Amazon Punchout Order

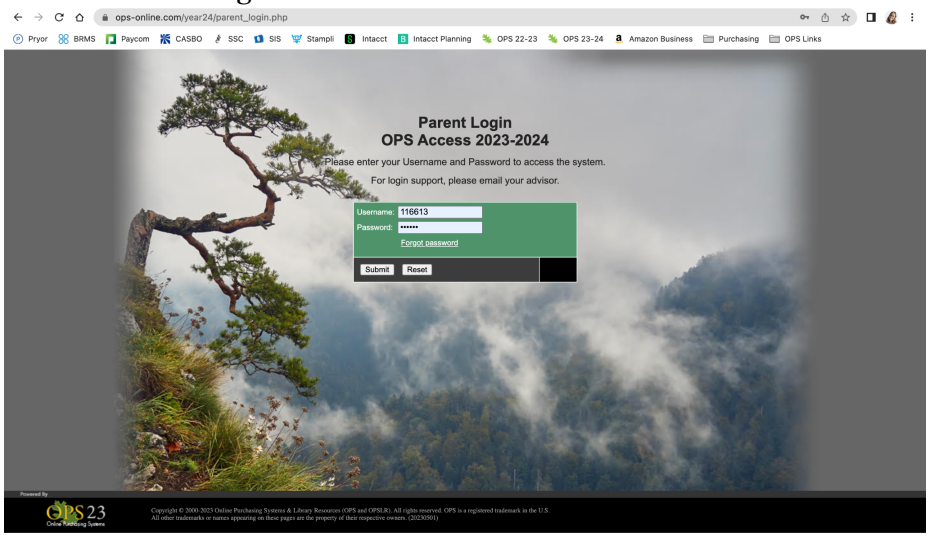
First, you need to make sure they have their school issued email ending in "@eacsstudent.org" with the corresponding password. If they need to reset the password because you do not have it, please contact Lauren Hansen or Alex Han (IT) to have it reset.
Once you have their email login credentials and OPS login information, please have them download Google Chrome and sign in to their Google Account in their web browser like it shows on this screenshot using their school email.



Next, copy and paste this OPS Parent Link to that web browser link after they sign in to their school Google account/email:

https://www.ops-online.com/year24/parent_login.php

Then have them sign in to OPS.



Once Signed in to OPS -> Go to the Purchasing Tab , select the student and click the Amazon Icon, Request Button it will prompt you to a new page and follow these instructions.

Amazon Punchout Instructions Link

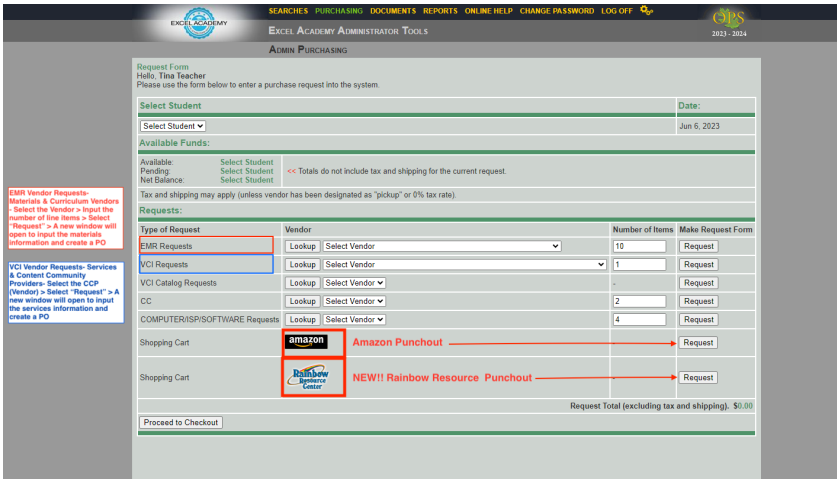
NEW!!! Rainbow Resource Punchout

1. Login to OPS portal.

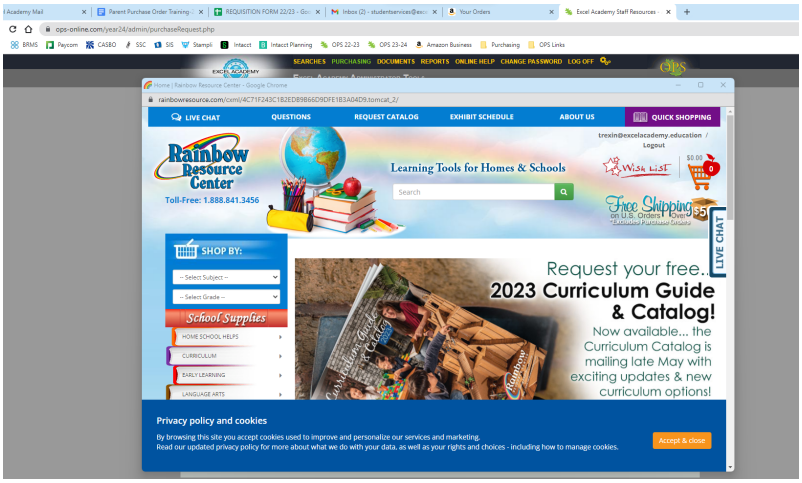
   https://www.ops-online.com/year24/excel/

   Parent - https://www.ops-online.com/year24/parent_login.php

2. Click on the Purchasing Tab



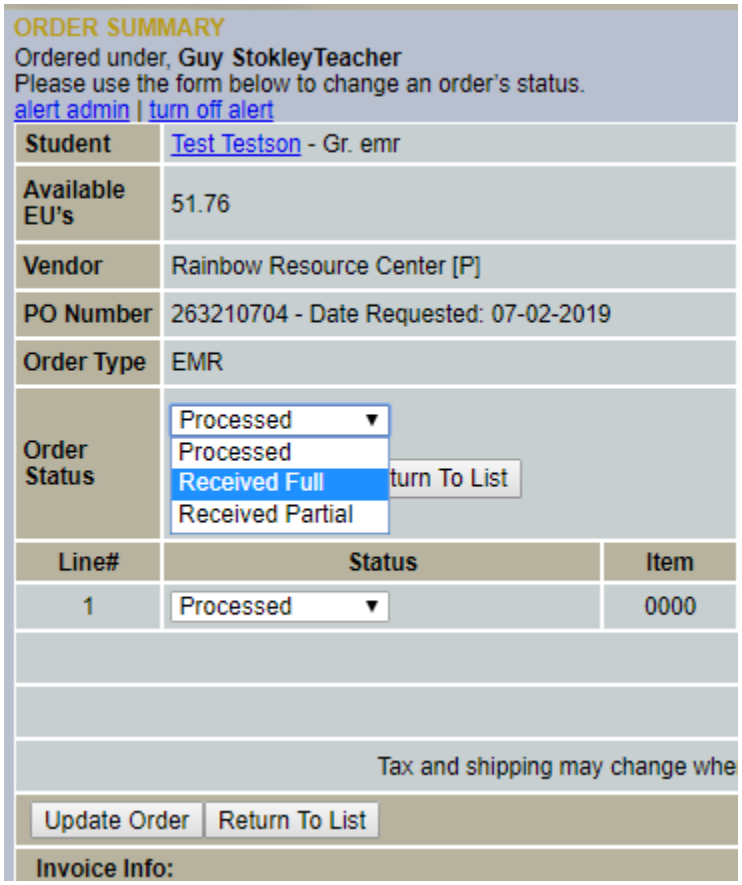
3. Click “Request” next to the Rainbow Resource PunchOut Icon to access the RRC website



4. Add items to cart and proceed to check out. Once you are done shopping in Rainbow Resource, checkout and it should take you back to OPS and generate a Purchase Order. The TOR will then approve the order and move forward to Administration for approval.

Marking EMR Orders Received

All materials are shipped directly to the students' residence. It is critical that the ToR mark the order received within 48 hours of receipt. For all materials received, the ToR verifies the contents of the box against the packing list. To mark an order received, locate the purchase order in OPS (see "Searching for Orders" section on how to perform a PO search). Change the status of each item received to "Received." When finished select "Update Order."



For damaged or missing items, leave status as "Processed" and place an internal note for our Business Services department and send an alert.

Use "Received Partial" only if part of the quantity of an item ordered has been received. Ex: 3 boxes of crayons were ordered and only 1 box was received. Place a note and alert the admin if an incorrect amount of items is received.

Approving EMR Orders Placed by Parent

Orders placed by parents must be thoroughly reviewed by ToRs to ensure that they meet Excel Academy ordering standards. Ordering Guidelines are available to ToRs and to parents as well.

EXAMPLE: In the below order placed by the parent, there are several issues that need addressing.

ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

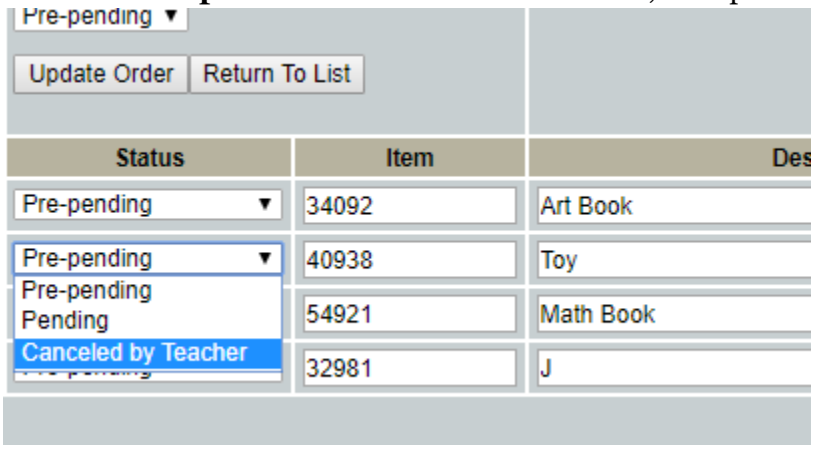
Student	Test Testson - Gr. emr	**Order Notes:**	Add internal note | View/Add PO note
Available EU's	955.95		
Vendor	Rainbow Resource Center [P]		
PO Number	263210760 - Date Requested: 07-03-2019		
Order Type	EMR		
Order Status	Pre-pending ▼ Update Order | Return To List		

Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pre-pending	34092	Art Book	Art	☑	1	10.00	10.00
2	Pre-pending	40938	Toy	Multi-Subject	☐	1	50.00	50.00
3	Pre-pending	54921	Math Book	Science	☐	1	15.00	15.00
4	Pre-pending	32981	J	Office/School Supp	☐	1	0.00	0.00
							Tax:	5.81
							Shipping:	15.00
			Tax and shipping may change when invoice matched.				**TOTAL:**	95.81

Update Order | Return To List

Invoice Info:

- Toys are not appropriate uses of student funds. To cancel this item, click on the drop-down box **on the specific line** and select "Canceled", then press "Update Order."



Item descriptions will not be as blatant as the above example. You must be judicious in scrutinizing each item on an EMR order.

- These item descriptions are incomplete. All orders must have the full name of the product in order to be approved and processed. Full Description of items must be in the Description section.
- Line item 4 has an incomplete item description and price. Look up the item number on the Rainbow Resource website (or whichever vendor the order is for) and find the correct

item. Update the item description and unit cost to the correct item and press “Update Order” at the bottom.

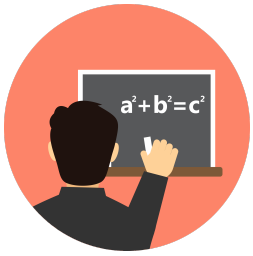
- It is also the ToR’s responsibility to ensure that items are correctly marked as consumable or non-consumable.

Once you have approved the items on the order, reviewed that the item numbers, descriptions and prices are correct, change the line item status using the drop-down to “Pending” and press “Update Order.”

How to place a VCI order

Training video: ToR VCI Training

1. Check the provider’s website OR CALL to confirm class description, cost and payment option (either monthly or lump sum—see item 6).



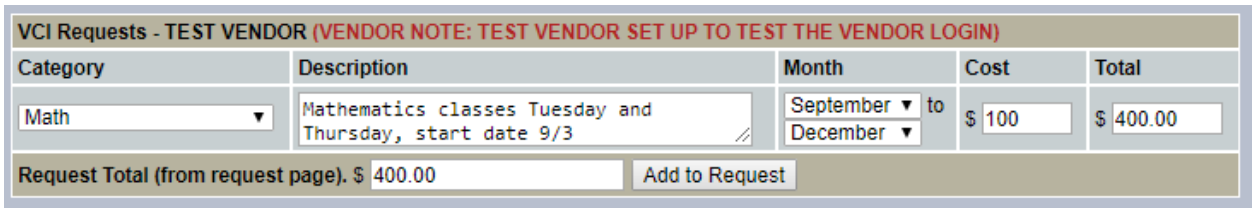
2. Follow the first two steps of the Placing EMR Orders.

3. Choose the correct provider name from the “VCI Requests” drop-down.

Select Student:			Date:
Testson, Test, test - 955.95 EUs			Jul 3, 2019
Available Funds:			
Student Totals Available: $955.95 Pending: $144.05 Net Balance: $955.95	<< Totals do not include tax and shipping for the current request.		
Tax and shipping may apply (unless vendor has been designated as "pickup" or 0% tax rate).			
Requests:			
Type of Request	**Vendor**	**Number of Items**	**Make Request Form**
EMR Requests	Select Vendor	8	Request
VCI Requests	TEST VENDOR, - TESTVEND	1	Request
VCI Catalog Requests	Select Vendor	-	Request
COLLEGE COURSE Requests	Select Vendor	2	Request
COMPUTER/ISP/SOFTWARE Requests	Select Vendor	4	Request
ACTIVITY Requests	Select Subject	1	Request
		Request Total (excluding tax and shipping). $0.00	
Proceed to Checkout			

4. Then, check for any **red notes** that will determine how the provider requests the order to be placed. This particular provider doesn't have any so there are none listed. Next, choose the most appropriate **"Category"** on the drop down menu, write a brief description of services, including the class’s start date under the field **"Description,"** use the drop down menu to select the

correct months, enter the cost per month or lump sum payment if lump sum was requested and click **"Add to Request."**

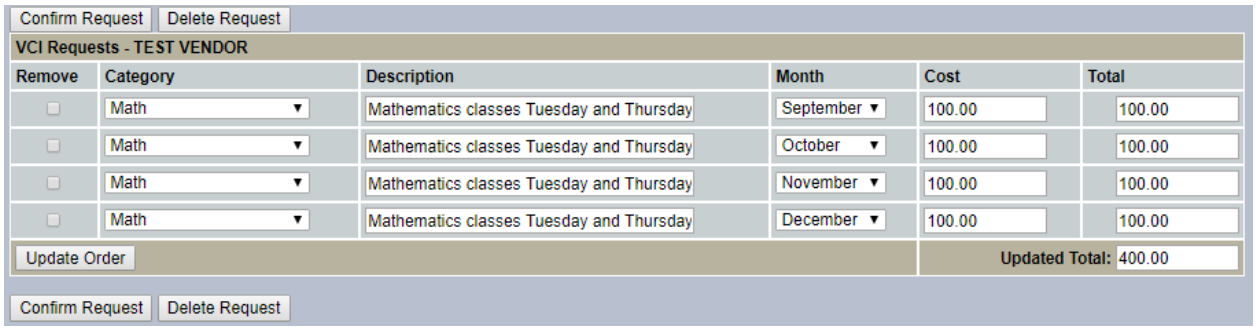


- If placing an order for one month only, select the same month from both drop-downs.
- If placing an order for more than one month, select the first month of service to the last month of service. *The system will create as many POs as there are months that are selected.*
- If placing an order MID month, please be sure that you have notated the start date on the PO (the start date needs to be after the date the PO was submitted) and **ALERT** admin.

5. The months are divided into separate purchase orders. Community Providers have the option of being paid monthly or in a lump sum at the end of the class If the community provider requested to be paid monthly, costs will be entered for each month. Check for accuracy and click **"Add to Request."**
**If the student enrolls late and has a partial month of service please work with the CCP to figure out the pro-rated cost for a partial month of service.

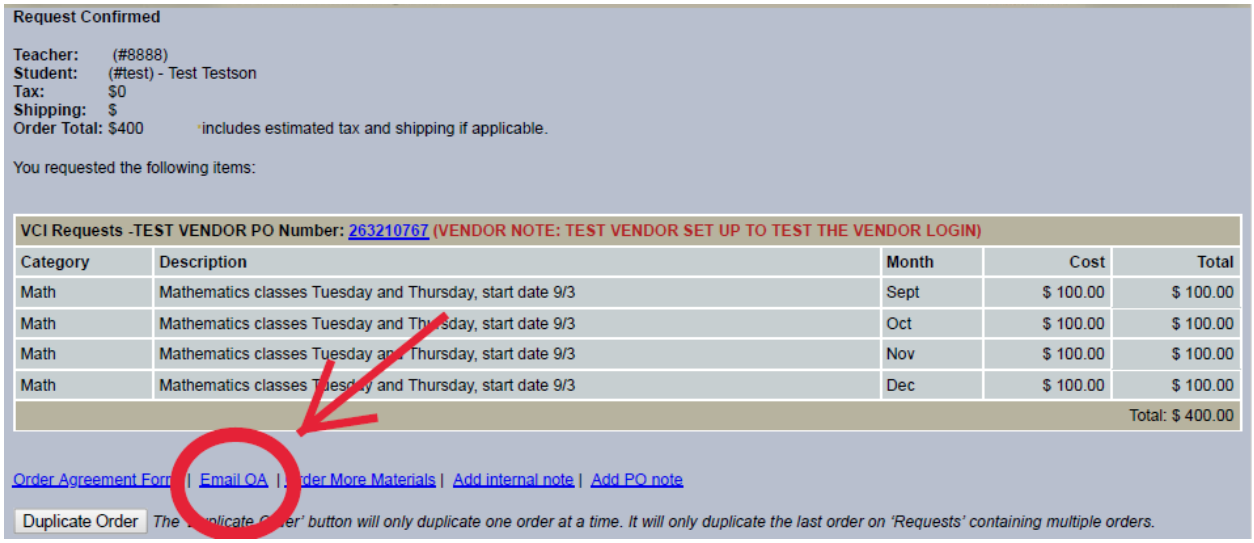
6. If the provider has requested to be paid in a lump sum at the end of the class, Please create a PO for ***last month of the class only.*** ToR will enter in the description line "Title of Class - Sept - Jan - Lump sum requested". Please hit Alert so the Student Services Department knows to send this notice to the community provider right away Check for accuracy and click **"Add to Request."**

7. After verifying all the information, click "Proceed to Checkout." Click on "Confirm Request" if all information looks correct.



8. **IMPORTANT:** On the next screen you **absolutely *MUST* click on EMAIL OA.** If you forget to email the OA, you can send it using these instructions.

Without this the provider will not be notified that a PO has been created and your student may not be able to receive the services requested.



Request Confirmed

Teacher: (#8888)
Student: (#test) - Test Testson
Tax: $0
Shipping: $
Order Total: $400 includes estimated tax and shipping if applicable.

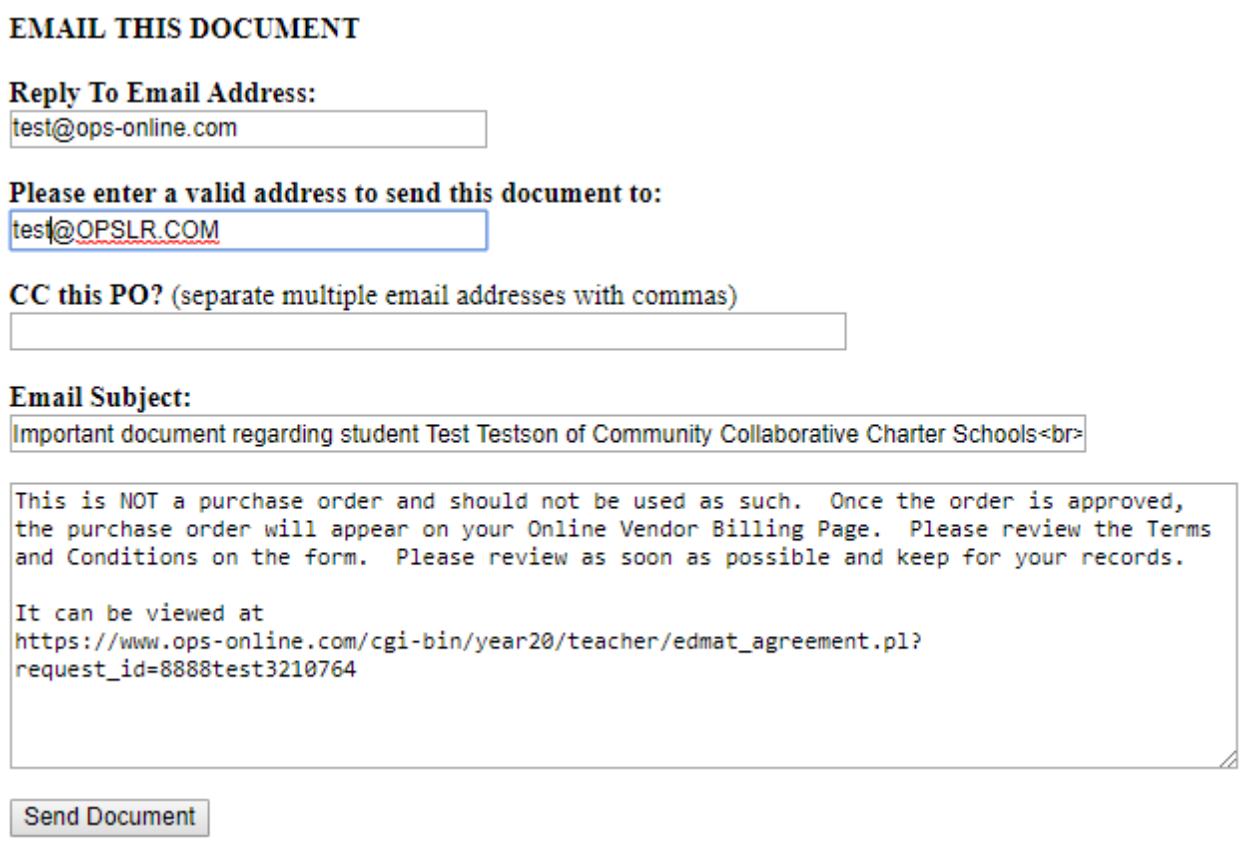
You requested the following items:

VCI Requests -TEST VENDOR PO Number: 263210767 (VENDOR NOTE: TEST VENDOR SET UP TO TEST THE VENDOR LOGIN)				
Category	Description	Month	Cost	Total
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Sept	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Oct	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Nov	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Dec	$ 100.00	$ 100.00
				Total: $ 400.00

Order Agreement Form | Email OA | Order More Materials | Add internal note | Add PO note

Duplicate Order *The 'Duplicate Order' button will only duplicate one order at a time. It will only duplicate the last order on 'Requests' containing multiple orders.*

On the next screen, click “Send Document”:



EMAIL THIS DOCUMENT

Reply To Email Address:
test@ops-online.com

Please enter a valid address to send this document to:
test@OPSLR.COM

CC this PO? (separate multiple email addresses with commas)

Email Subject:
Important document regarding student Test Testson of Community Collaborative Charter Schools

```
This is NOT a purchase order and should not be used as such.  Once the order is approved,
the purchase order will appear on your Online Vendor Billing Page.  Please review the Terms
and Conditions on the form.  Please review as soon as possible and keep for your records.

It can be viewed at
https://www.ops-online.com/cgi-bin/year20/teacher/edmat_agreement.pl?
request_id=8888test3210764
```

Send Document

9. Check to ensure the order was placed correctly by following the instructions in the Searching for Orders section to find and verify the POs.

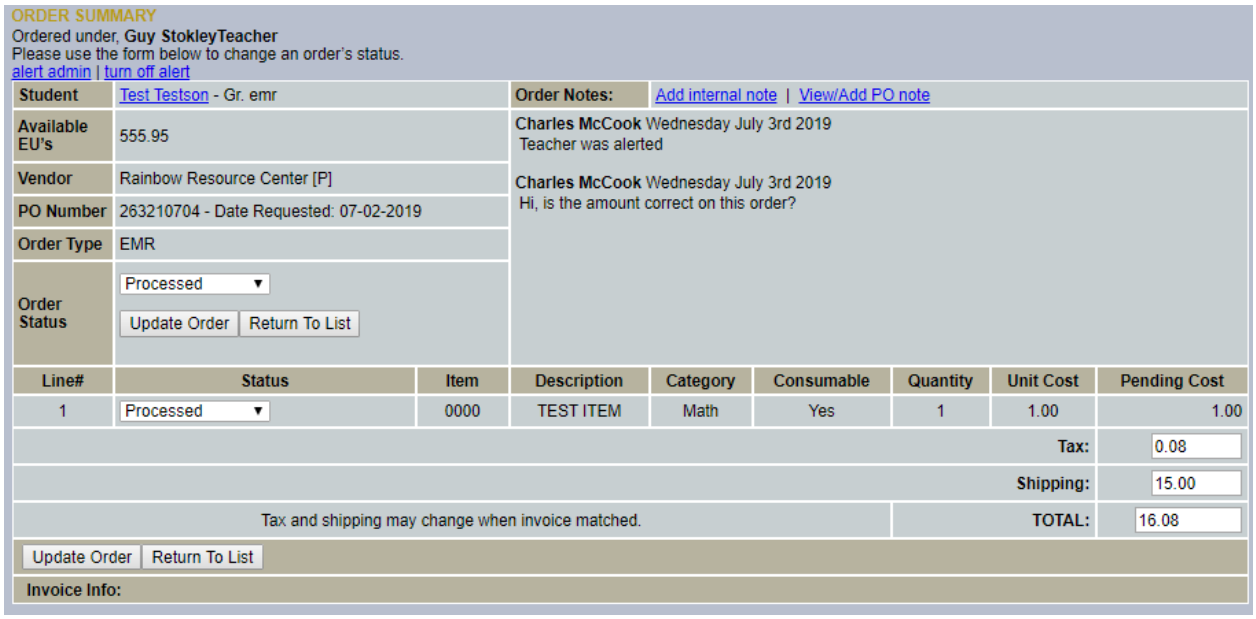
Purchasing Online Courses

When placing a PO for an online course, please pay careful attention to the content providers notes as additional steps may be required. If the online course is an EMR, mark the order "Received" once the student receives access to the online course. **ALL ORDERS PLACED FOR ONLINE CONTENT PROVIDERS MUST INCLUDE THE PARENT FIRST AND LAST NAME ALONG WITH THEIR EMAIL ADDRESS IN THE PO DESCRIPTION LINE.**

Internal Notes

1. You can make an internal note when you first create the purchase order or you may search for the purchase order and add an internal note later. To find the order, please follow the instructions in the Searching for Orders section.

2. Then find the purchase order that needs the internal note and click on the Purchase Order number. You will be taken to the order summary page.



ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

Student	Test Testson - Gr. emr	**Order Notes:**	Add internal note | View/Add PO note
Available EU's	555.95	**Charles McCook** Wednesday July 3rd 2019 Teacher was alerted	
Vendor	Rainbow Resource Center [P]	**Charles McCook** Wednesday July 3rd 2019 Hi, is the amount correct on this order?	
PO Number	263210704 - Date Requested: 07-02-2019		
Order Type	EMR		
Order Status	Processed Update Order Return To List		

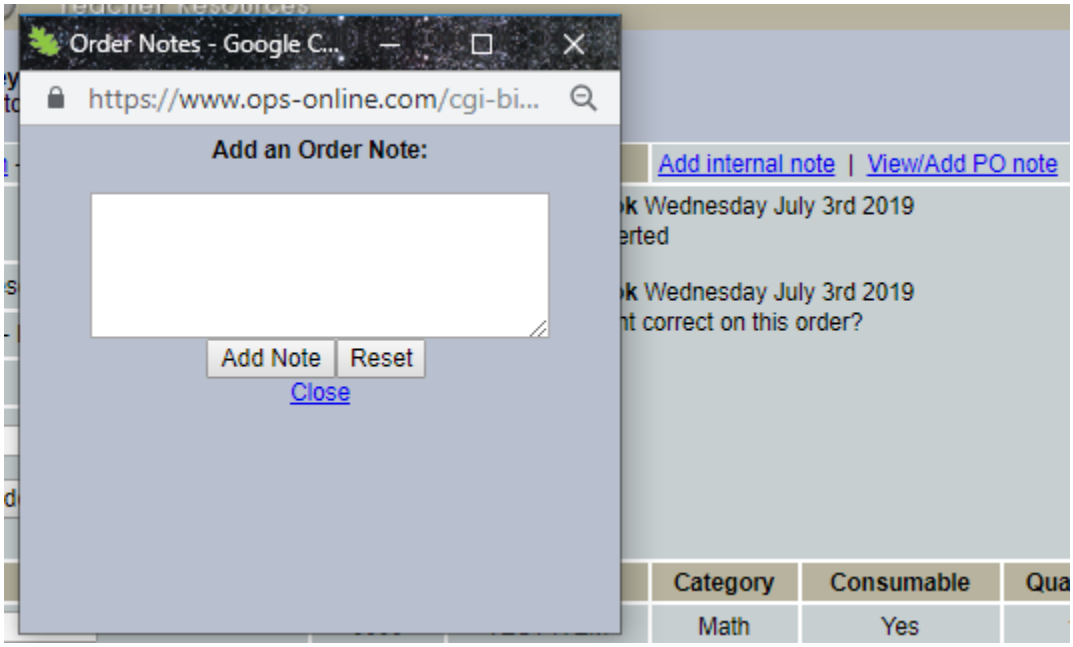
Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Processed	0000	TEST ITEM	Math	Yes	1	1.00	1.00
							Tax:	0.08
							Shipping:	15.00
			Tax and shipping may change when invoice matched.				**TOTAL:**	16.08

Update Order Return To List

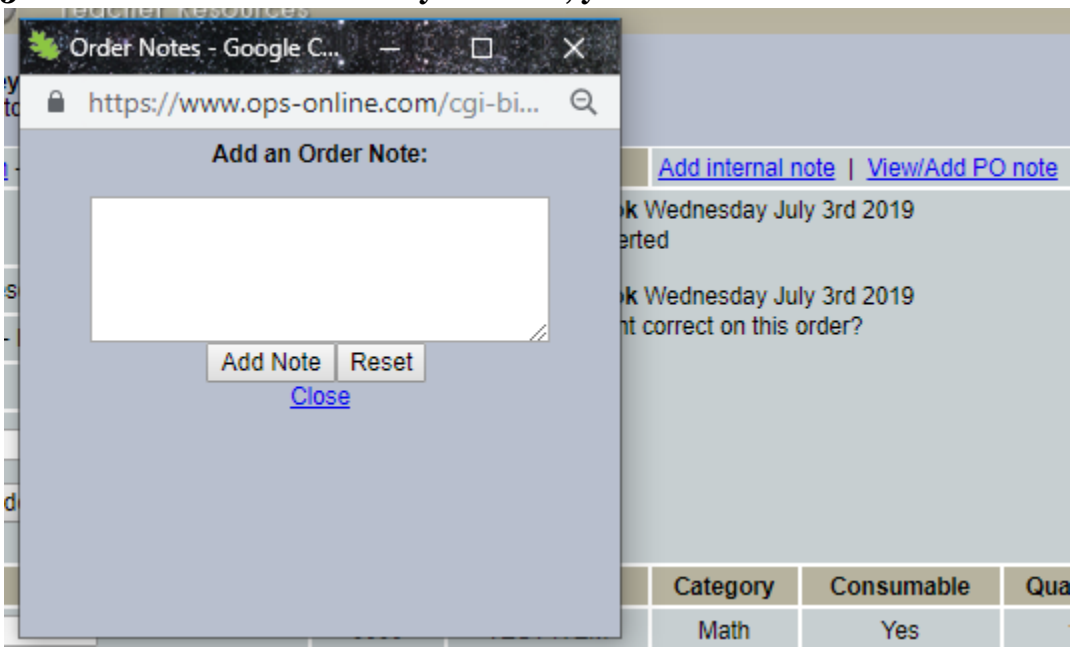
Invoice Info:

3. Click on **"Add Internal Note."**

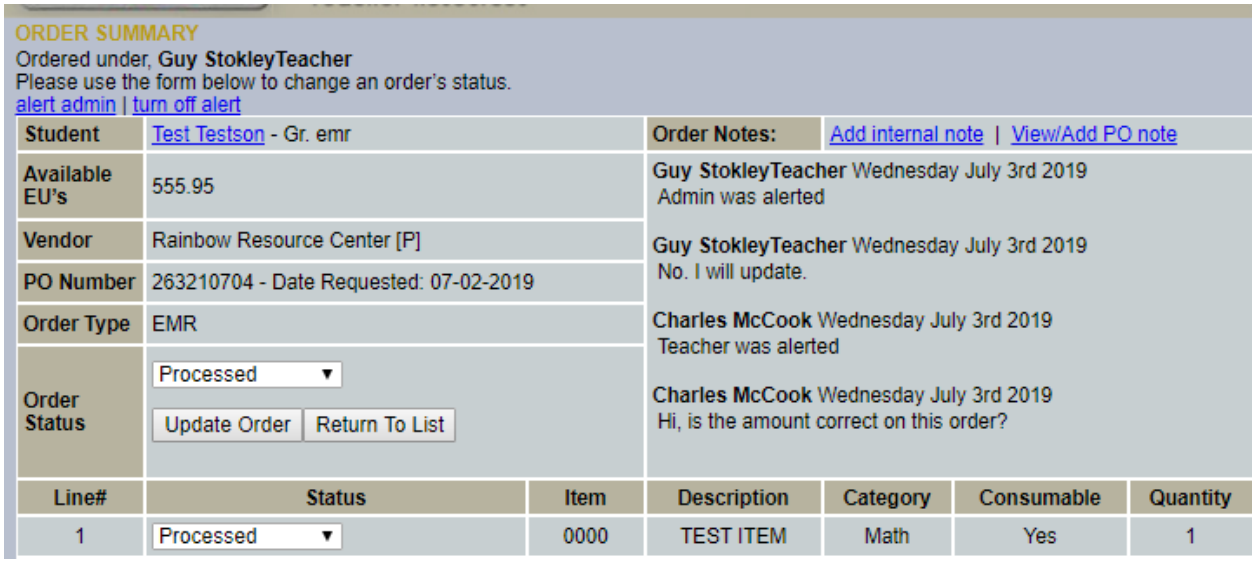
4. A small dialog field will then pop up in the left hand corner of the screen. Enter the internal note and click the field **"Add Note."**



5. In order for admin to see your note, you must click on "Alert Admin to Note."



6. To confirm your note was added and admin was alerted, check the Order Summary.


ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

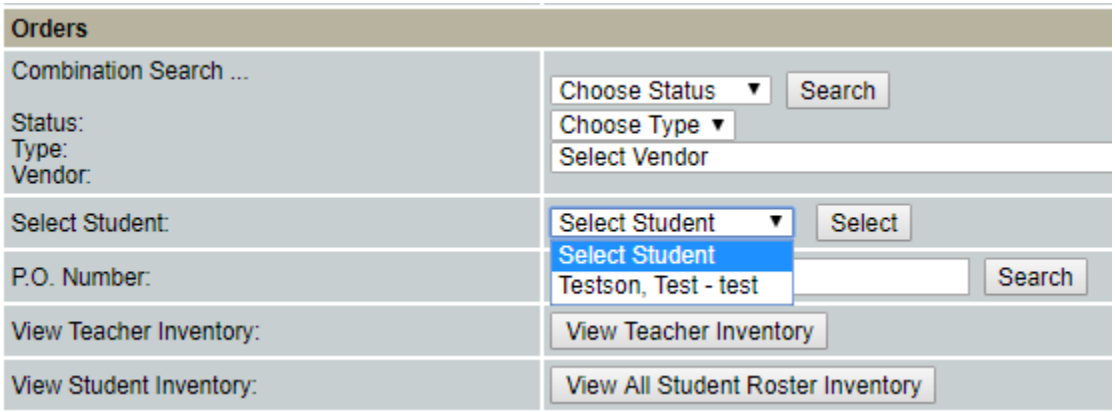
Student	Test Testson - Gr. emr	**Order Notes:**	Add internal note | View/Add PO note
Available EU's	555.95	**Guy StokleyTeacher** Wednesday July 3rd 2019 Admin was alerted **Guy StokleyTeacher** Wednesday July 3rd 2019 No. I will update. **Charles McCook** Wednesday July 3rd 2019 Teacher was alerted **Charles McCook** Wednesday July 3rd 2019 Hi, is the amount correct on this order?	
Vendor	Rainbow Resource Center [P]		
PO Number	263210704 - Date Requested: 07-02-2019		
Order Type	EMR		
Order Status	Processed Update Order | Return To List		

Line#	Status	Item	Description	Category	Consumable	Quantity
1	Processed	0000	TEST ITEM	Math	Yes	1

The Order Notes will display your note, and indicate that the alert was sent. If the alert was not sent, you can send it again by clicking "Alert Admin."

Searching for Orders

1. Once the order is placed, you can find it by clicking on the "Searches" tab on the top. Under the "Orders" section, select the student whose orders you would like to see.


Orders

Combination Search ... Status: Type: Vendor:	Choose Status ▼ Search Choose Type ▼ Select Vendor
Select Student:	Select Student ▼ Select Select Student Testson, Test - test
P.O. Number:	Search
View Teacher Inventory:	View Teacher Inventory
View Student Inventory:	View All Student Roster Inventory

2. On the subsequent page, you can see all orders placed for that student.

Orders Search
Your search has returned 7 results.

Request #	Purchase Order #	Order Status	Req Type	Req Date	Student	Vendor	Orig Cost	Tax	Use Tax	Shipping	Actual Cost	Order Stat Date
8888test3200186	263200186	Canceled	EMR	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200187	Canceled	VCI (Sept)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200188	Canceled	VCI (Oct)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200189	Canceled	VCI (Nov)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200264	263200264	Canceled	VCI (Sept)	05-03-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-03-2019
8888test3210704	263210704	processed	EMR	07-02-2019	Test Testson	Rainbow Resource Center [P]	1.00	0.08	0.00	15.00	16.08	07-03-2019
8888test3210704	263210705	Pending	EMR	07-02-2019	Test Testson	Amazon	1.00	0.08	0.00	15.00	16.08	07-02-2019

3. In OPS, there are many ways to find the orders you are looking for. Instead of the above process, you can also use the Order Combination Search under the “Searches” tab.

Orders

Combination Search ... Status: Type: Vendor:	Choose Status ▼ Search Choose Type ▼ Select Vendor
Select Student:	Select Student ▼ Select
P.O. Number:	Search
View Teacher Inventory:	View Teacher Inventory
View Student Inventory:	View All Student Roster Inventory

On the combination search, you may designate multiple criteria to assist you in locating orders. If you would like to see all orders of a particular status, type, or provider, you may select that criteria from the drop-down list. You may also combine this criteria: for example, select “Pending” and “VCI” from the Choose Status and Choose Type drop-downs to see all pending VCI orders. **TIP:** Scrolling through a long list of providers can be a daunting process. When you click on the drop-down menu, you may begin typing the name of the provider you are searching for. The list will then jump to that provider.

Training video: ToR Order Search Training

Content & Community Provider-Specific Order Instructions

Certain providers have specific ordering instructions. These providers include, but are not limited to:

- Amazon
- ASTEME Learning Center
- Staples

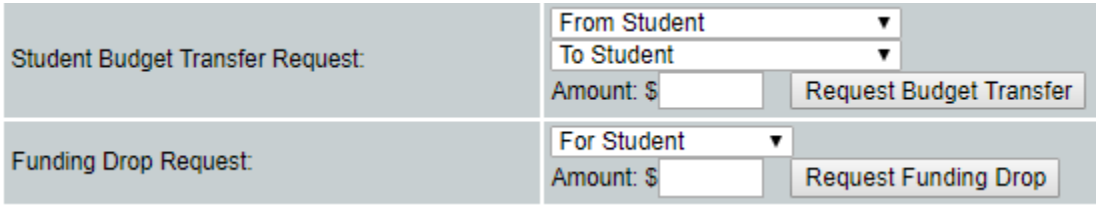
- Start ASL
- Teachers Pay Teachers
- Time4Writing
- Urban Workshop

These instructions are located in the Student Services Department Ordering Instructions folder. Along with Provider-specific ordering instructions, this folder will also contain processes that will assist you in completing your duties as a ToR.

Transferring Funds Between Siblings

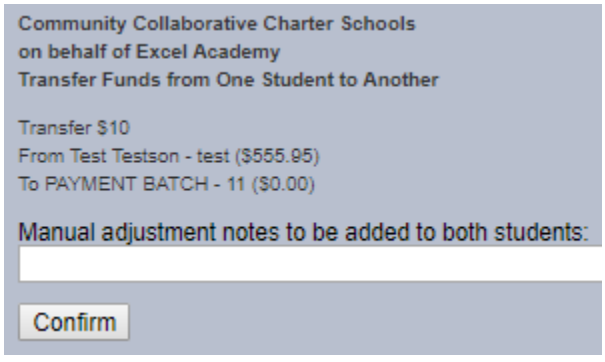
Excel Academy Charter School allows families to transfer funds between siblings to place combined orders to save on shipping costs. **It is the ToR's responsibility to ensure that each student has core curriculum in place and is sufficiently supported in their education.**

To place a budget transfer request, navigate to the "Searches" tab, and scroll to the "Students" section. There, you will see the "Student Budget Transfer Request."



Select the student FROM whom you would like to transfer the funds, and the student you would like to receive the funds. Then, enter the amount and select "Request Budget Transfer."

On the next screen, you MUST add an explanation for the request. Enter why the request is being made, then click confirm.



The BusinessServices Department will review the request and decide whether to approve or deny. ALL REQUESTS WITHOUT EXPLANATIONS WILL BE DENIED.
Fund transfers between siblings must be for:

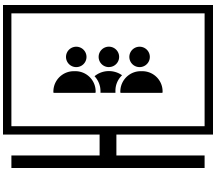
- ❖ Core Subjects Only
- ❖ Tutoring is OK
- ❖ $350 per allotment
- ❖ Combined orders to save on shipping costs

Instructional Funds Amounts

Personalized Path
TK-8th $2,900

High School $3,400

The IFs are disbursed in multiple allotments:
TK - 8th $1,450 in August, $1,450 in November
High School $1,650 in August and $1,650 in November



Virtual Path
1st - 8th $1600

The IF's will be disbursed in multiple allotments:
1st - 8th $800 in August, $800 in November

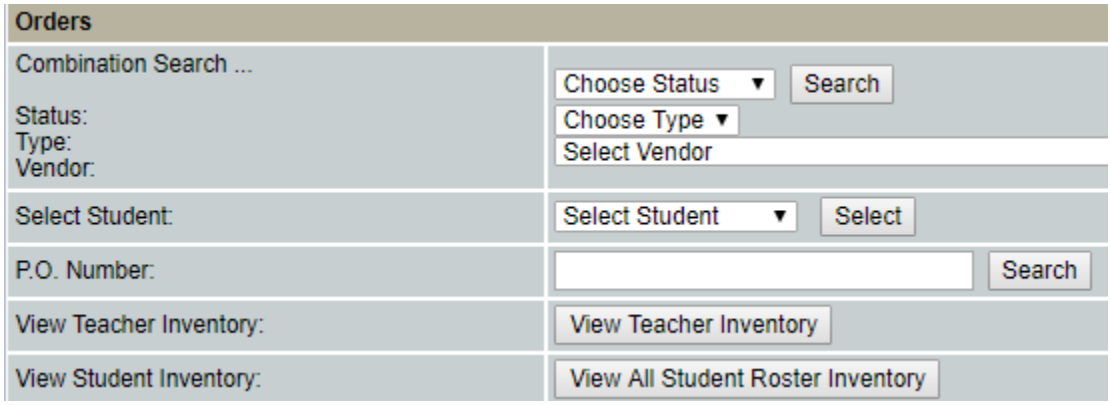
Disallowed Items

Please refer to the "Ordering Guidelines" Google Doc for a detailed list of allowed/disallowed items. It is available on the website.

Returning Materials

All non-consumable materials are property of Excel Academy Charter School and must be returned when the student withdraws from Excel Academy. This needs to be explained to the parent at the initial meeting. Please collect materials at the time of withdrawal.

To view the list of outstanding student materials, go to the "Searches" tab and scroll to the "Orders" section. Click on "View All Student Roster Inventory."



Staying Within Budget

The ToR is responsible for making sure the student stays within budget. This is a very important part of the ToR's job. Do not rely on the parent to stay within budget. In order to make sure you are staying within budget, you must estimate an extra 30% for EMR orders to account for shipping and tax. Once our student services department has paid the final bill, an accurate total will be updated in OPS. This is especially important to pay attention to in the spring when the ordering window is closing and parents are sending off many material orders to use up the remainder of funds.

No Out of Pocket Payments

Parents will not be reimbursed for the curriculum. It is critical to make parents aware of the ordering procedures so that they don't believe they can hand you a receipt and expect reimbursement. Under no circumstances will parents be reimbursed.

Basic Materials Only

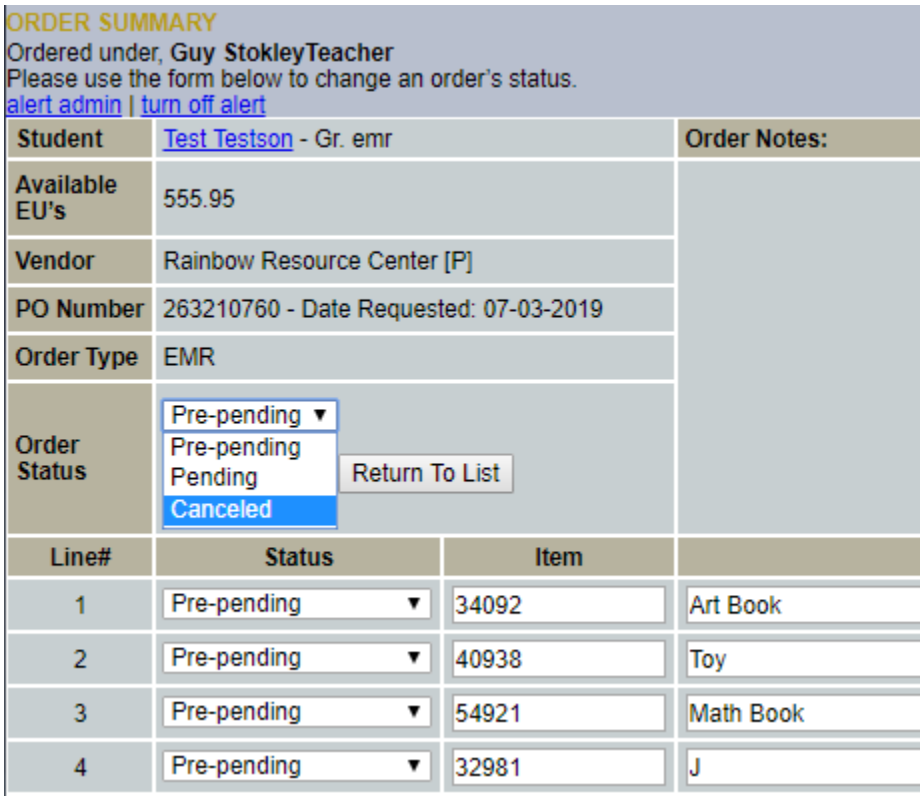
All EMR orders must be basic school supplies. In other words, we can only purchase the type of supplies that could be found in a brick and mortar public school. We also cannot pay for high priced/overpriced lessons, classes or materials. Please refer to the "Ordering Guidelines" Google Doc for a detailed list of allowed/disallowed items.

Cancellation Policy

We cannot cancel an EMR order after they are processed and sent to the content provider. Once materials are requested, the Student Services Department will order them and they cannot be canceled. If an order has not been processed and is still in "Pre-Pending Status," the ToR can cancel or edit the purchase order in OPS. For VCI orders, community providers must be notified of cancellation prior to orders being canceled in OPS. It is the responsibility of the ToR to ensure that the community provider has been notified and any outstanding payments have been reviewed and adjusted accordingly in OPS.

To cancel a purchase order in the pending stage, you must pull up the purchase order by completing a search. Then click on the drop down menu **"Pre-Pending"** and choose

"Canceled." Then click **"Update Order."** If you don't click **"Update Order"** the order will not cancel.



When orders are canceled the funds are automatically returned to the student account.

Backordered items

When items are backordered, two things *can* happen. Sometimes our Student Services Department is notified by the content provider and will send you an alert in OPS. Other times, we find out when we get the order and the item is not with the other items in the box. Usually there will be a note on the packing slip that the item was backordered. If this happens, search for the purchase order in OPS and add an internal note. Backordered items are especially unfortunate when we find out after the end of the ordering window in spring. If it is past the ordering window, the parent cannot request an alternate item. Please encourage families to complete their orders well in advance of the deadline.

Ordering Deadline

April 12th, 2024 is the deadline for the parents to get PO requests submitted for review. ToRs will submit all approved orders requests no later than April 26th, 2024. After the deadline, no purchase orders can be submitted. IFs do not roll over from year to year. If the IFs are not used by the deadline, the parent will no longer have access to them.

It is a good idea to **periodically check your students' funds**. Funds should be used evenly throughout the year and not all at once at the end of the year. The Ordering Guidelines state that excessive quantities of anything will be rejected, and this likewise applies to extremely large orders at the end of the year.

For EMR orders late in the year: Students must reasonably be able to use all items by the last day of school. If the Student Services Department believes not all items can be used in time, you will be asked to cancel some from the order.

Computers

Each year we will put out a list of computer providers and the items that may be purchased from them. We will not allow any computer purchases from providers or items that are not on that list. The list may continue to change throughout the year and we will keep you updated as to what the current selections are. To place a computer order, you will follow all of the above instructions for content providers. (Computers may come either to the office in Irvine, or to your house, depending on the provider. You will be notified if a computer arrives in the office for your family.)

Other Questions

For other questions, please read the materials in the Student Services Department Ordering Instructions folder in the Shared Drive and the ToR FAQ.

Discipline - PINs and BIPs

Progress Improvement Notifications (PINs)

Excel Academy aims to partner with families to create a positive atmosphere in which mutual trust is built between the ToR and parent. In order to achieve this, it is crucial that teachers explain policies and expectations *thoroughly* with parents at the beginning of each school year. Most families will only need this one explanation to smoothly navigate through the rest of the year without a problem. However, some families will fall short of fulfilling Excel Academy Charter School policies and expectations. For those families, we have set up our Progress Improvement Notification (PIN) system, which works to inform parents of their failure to follow policy. Hopefully, this will correct the behavior and show that we have done our due diligence of identifying needed improvement and informing the parent.

Excel Academy has procedures in place to address violation(s) of school policies and student discipline when it comes to academic progress and behavior issues. These processes are categorized as Progress Improvement Notification (PIN) or a Behavior Improvement Plan (BIP) and detail how Excel Academy addresses a variety of respective infractions.

How Do I Know When to PIN?

Students can earn a PIN anytime they or the parent fail to comply with responsibilities outlined in the EACS Handbook, Acknowledgement of Responsibilities, and/or Master Agreement. During the first LP, it is important for ToRs to issue immediate PINs for families who do not make contact, miss a meeting, or fail to check-in. A ToR may follow a three-day time period. Beginning LP 2 when a ToR notices a student or family falling behind, they should immediately email the family and identify the issue along with a one-week time period to make adjustments. If the family fails to comply by the deadline, then a PIN should be issued. If you feel that a parent or student has failed to comply with Excel Academy expectations and policies, please contact April Saade (Elementary Principal) for TK-6th or Lorrie Wood (Secondary Principal) for junior high and high school students *before issuing or threatening a PIN*.

Some of the most common times PINs are issued:

1. Lack of work completion or failure to show work completion.
2. Failure to attend a learning period meeting or other mandatory school meeting.
3. Lack of communication for more than 5 school days, despite attempts at contact by phone and email.
4. Late cancellation of a meeting or cancellation of more than two required school meetings for non emergency reasons.

5. Failure to complete required WIN and/or ELD assignments.

Weekly Check-Ins and PINs

ToRs will conduct weekly check-ins and will monitor student progress.

Prior to submitting a PIN, all ToRs are responsible to reference the Levels of Support to guide students through areas of concern. Issuing a PIN requires evidence that the ToR utilized the Levels of Support to get the student/family back on track.
Levels of Support

Attendance

In our non-classroom based model, attendance is calculated two ways via work progress and daily engagement. Daily engagement is recorded daily in School Pathways. Please Note: If you are unable to take full attendance for any reason, *please contact April Saade (Elementary Principal) or Lorrie Wood (Secondary Principal) and the Registrar*. They will work together to ensure that attendance is properly recorded for each ToR for the LP.

Completion of PINs

It is the ToR's responsibility to fill out all PINs. PIN templates are located in the ***Shared Drive***, in the ***Dept. of Education Folder,*** then ***PIN Template Folder***. This year we are utilizing one PIN template that can be used for all types of PINs. Please read the directions carefully. Always make a copy of the template and save it to your drive before continuing with filling out the information. All general education PINs will be sent to April Saade (Elementary Principal) or Lorrie Wood (Secondary Principal) for review before being sent to the office staff. Any time a second PIN is issued, an AIM meeting will be required. In some cases an SST may be held in lieu of the AIM meeting to ensure the student is being supported adequately. The respective department will make this determination and will inform families for which meeting they should attend. PINs remain in the student file for the academic school year and start over each new school year. If a student receives three PINs in one school year, a third party review may be held by the AD of Education in conjunction with the parent, ToR, and an unbiased third party to see if independent study is in the best interest of the student. The determination is final and immediate. For students receiving special education, an IEP team meeting is required to be held following the issuance of a third PIN. Leah Vides (SPED Program Specialist) should be made aware of all PINs being issued to students with IEPs. Students with IEPs may not be referred to third party review until after the IEP meeting is held to discuss the impact of the student's disability.

Behavior Improvement Plans

Excel Academy will issue a Behavioral Improvement Plan for a student if they violate Excel Academy's behavioral standards. The consequence of violating these behavioral standards as outlined in the BIP, may lead to suspension or from Excel Academy.

For students who commit violations such as dishonesty, cheating, disruption, and inappropriate language, a BIP will be issued with consequences individually designed to help restore the individual student back into good standing with the school. These include but are not limited to a family meeting with the Teacher of Record and Administration, reflecting on the violation, creating a plan of action for redirecting future behavior, writing a letter of apology, rewriting an assignment in question, removal from extra-curricular and/or co-curricular opportunities, removal from the National Honor Society, and/or an in-school suspension.

For students who commit plagiarism, the first offense will result in a zero on the assignment until the behavior is corrected. For the second offense, the student will be removed from the class and will receive an F in the course. If a student earns an F in a course that is required for graduation, then they will be required to repeat this course for credit. Any subsequent offenses will be dealt with on a case-by-case manner.

Violations that may result in suspension or immediate involuntary withdrawal are included in the school's charter petition.

Excel Academy has reviewed Education Code Section 48900 et seq., which describes the non charter schools' list of offenses and procedures to establish its procedures for suspensions and expulsions. The language that follows closely mirrors the language of Education Code Section 48900 et seq. The Charter School is committed to annual review of policies and procedures surrounding suspensions and expulsions and, as necessary, modification of the lists of offenses for which students are subject to suspension or expulsion.

When the Policy is violated, it may be necessary to suspend or expel a student from regular instruction. This policy shall serve as EACS's policy and procedures for student suspension and expulsion and it may be amended from time to time without the need to amend the charter so long as the amendments comport with legal requirements. EACS staff shall enforce disciplinary rules and procedures fairly and consistently among all students.

Pacing Guide Dates

Pacing Benchmark Deadlines

Fall Semester – starts August 28th

9/22/23	25% complete (19 days)
10/18/23	50% complete (18 days)
11/06/23	75% complete (18 days)
11/18/23 - 11/26/23	Thanksgiving break
12/8/23	100% complete & online finals have been scheduled (13 days)

Spring Semester – December 18th

12/18-12/21	Career and College Readiness Week (no ETL classes)
12/22/23-1/7/24	Winter break
2/6/24	25% complete (25 days)
3/15/24	50% complete (26 days)
3/30/-4/7	Spring break
4/26/24	75% complete (25 days)
5/24/24	100% complete & online finals have been scheduled (22 days)

Important Sample Due Dates:

Each quarter the following are due for the monthly sample - English essay, science lab, honors project. If the English and/or science course is an honors course, then only the honors project is needed for the monthly sample.

LP 2 - 10/20/23
LP 4 - 12/15/23
LP 7 - 3/7/24
LP 10 - 6/4/24

Adding/Changing/Dropping Courses

Students adding, changing (including curriculum), or dropping a course can only do so within 10 school days of the start of the semester or within 10 school days of enrollment without penalty. 10-day window:

Fall - 8/28/23-9/8/23
Spring -12/18/23-1/16/24

See below for further clarification:

- Courses dropped on or before the 10th school day will not show on the transcript.
- Courses dropped after the 10th school day in the first and/or second semester will receive a “W”on the report card/transcript.
- Courses dropped after 10/20/23 for fall semester or 2/23/24 for spring semester will receive a/an “F” on the report card/transcript.

Withdrawals may only be issued to students who hold a minimum of six courses prior to the withdrawal and wherein the drop will not impact graduation requirements. Seniors carrying five

courses may drop to a minimum of four courses as long as they carry sufficient credits to graduate.

- The minimum & maximum course policy is in place to ensure academic success.
- The minimum number of courses that high school students can register for is 5-6 courses per semester depending on the student's respective grade level (see graduation track options below for details).
- 12th graders who have earned 180 credits prior to the start of their senior year, can register for 4 courses per semester, equaling 40 credits for the school year.
- If a student is participating in concurrent enrollment, then a minimum of 4 Excel Academy high school-level courses must be taken each semester they are registered for a college course.
- The maximum number of courses high school students can register for is 8 courses per semester including concurrent enrollment courses. See below for concurrent enrollment requirements.

Understanding A-G

- A Parent's Guide to A-G Requirements
- UC admissions requirements by subject
- CSU admissions requirements

A-G Protocol:

1) Every core high school is now considered A-G approved. Therefore, students must choose and complete course curricula from the High School Course Curriculum Catalog.
2) For students completing courses from an in-person provider, ToRs must verify that the corresponding course syllabus aligns with the Excel Academy approved CP coursework. This is because Excel Academy is the institution issuing the credits and not the provider.
3) For Master Agreements, the course names will be prefaced by BT for some electives, CP, EDG, EDY, FLV, LB, or TGS.
1)

Community College Courses

Community College Courses - Concurrent Enrollment Policy

Students may request concurrent enrollment courses by following these steps:

1. Students and parents/guardians discuss concurrent enrollment options with their ToR.

2. ToR will discuss eligibility requirements which include the following: Students must have a minimum 3.0 GPA for academic courses or a 2.7 GPA for elective/vocational courses. Students must show college readiness in their respective core courses (ie. each community college sets their own prerequisites for determining high-school eligibility).
3. School Counselors will only approve college-level courses which are defined as courses that will earn college credit and are either UC/CSU transferable or applicable to earning an Associate's degree or higher. Courses not receiving credit will not be approved.
4. ToR completes Concurrent Enrollment Course Survey.
5. The High School Department either grants or denies approval for a student to take the requested community college course.
6. High School (9th-12th) students must be enrolled in at least 4 Excel classes (20 credits) per semester at Excel Academy to be considered eligible for concurrent enrollment at a community college. Students may take a maximum of 2 community college classes per semester while concurrently enrolled in Excel Academy. This may include one semester-length course and one interim session or two semester-length courses per semester.
7. Junior high (7th-8th) students interested in taking community college courses are limited to math (Algebra 1 or higher math) and/or world language. Please see the Community College Handbook for grade-level policy per community college.
8. Students must complete and sign the concurrent enrollment form obtained from the community college Admissions office and submit it to the Excel Registrar's office (registrar@excelacademy.education). Please note: The turn-around time for concurrent enrollment approval is 3-7 days depending on wet signature requirements.
9. It is the responsibility of each student to take this signed form back to their respective community college to submit and finalize registration.
10. It is also the responsibility of the student to know the community college's fees, registration, and deadline dates (information can be found on the college's website).
11. If a student's first choice is unavailable and/or if they are unable to register for courses, the student is responsible for informing their ToR and High School Counselor. In this circumstance, students **must** work with their ToR in either finding another course to add to their Master Agreement or removing the course from their schedule. Students need to be aware that if they are unable to register for a late-start college course, then they will be required to enroll in a late-start accelerated high school course with Excel Academy depending on their minimum course count. If an additional community college course is chosen, students must complete and submit an additional concurrent enrollment form to reinitiate the process.
12. Students must be aware and adhere to all college rules and regulations.
13. In order to confirm the course will transfer to the university of the student's choice, please consult with a Community College Counselor.
14. Per the Community College regulations and the CDE, only 5% of Excel Academy students per grade level can attend a community college during the summer. Priority approval will be given to those needing courses to graduate.

15. If a student is found to enroll in a college course that has not been approved by the School Counselor and does not meet Excel Academy's prerequisites for college courses, even if the student completes the course, they will not earn dual credit. The student will earn college credit but not high school credit. The student will be required to complete the respective high school course for graduation purposes.
16. Students will only receive dual college credit in courses that have prior approval from the School Counselor. This MUST be pre-approved via the concurrent enrollment form.
17. Grades from any concurrent enrollment course will not be reflected on the Excel Academy transcript until the official college transcript has been received and verified. Upon completion of the college course, students are required to send an **official transcript** to the Excel Academy Registrar's office. Upon receipt, the high school transcript will be updated to reflect grades/credits earned. Please send all transcript requests to:

Excel Academy Charter School
ATTN: Registrar Department
1 Technology Drive, Ste. I-811
Irvine, CA 92618

****If a student fails the community college class and the class/credits were planned toward graduation, then the ToR needs to alert Counselors ASAP to adjust the 4-year plan.

Honors Courses Process & Requirements:

Honors courses are designed to be more in-depth, challenging, and rigorous. Students may take honors courses with prior written approval. The student may submit the course for approval by following these steps:

1. ToR will discuss honors options with students and family
2. Student requests to register for an honors course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework
5. Honors courses require quarterly projects (see above dates)
6. ToR will assist students in meeting additional honors requirements
7. Students must meet the full criteria, or the course will not receive the honors designation
8. Honors credit will not be issued retroactively

AP Courses

Students may take AP courses through one of our online content and community providers with prior approval:

1. ToR will discuss AP options with students and family
2. Student requests to register for an honors course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework

5. ToR informs the student and family that the AP exam must be scheduled and completed through their local public high school. This should be done in early fall
6. Students take an AP exam through their local public high school in the spring

Additional Advanced Course Options

For students wishing to complete a year-long course in one semester (i.e. English 9 A/B) or two courses in the same subject simultaneously (i.e. English 9 A/B and English 10 A/B), they must choose an online curriculum from the High School Course Catalog or enroll in a concurrent enrollment course.

1. ToR will discuss advanced course options with student and family
2. Student requests to register for an accelerated course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework
5. ToR will aid the student in choosing curriculum that would work for this designation or follow the process for concurrent enrollment

For students who are credit deficient, they may request to complete two courses in the same subject simultaneously (i.e. English 9 A/B and English 10 A/B) if summer school is not an option. They must choose a curriculum from the High School Course Curriculum Handbookwith the exception of in-person provider courses.

Junior High students:

Qualified junior high students may take up to two, high school-level courses in either math (Algebra 1 or higher math) and/or world language.

Junior high students requesting to take a high school-level math course must meet the following eligibility requirements:

- Take a proctored and approved Algebra 1 or Integrated Math I readiness assessment with a score of 85 or higher.

And at least one of the following:

- Earn an 85% in a pre algebra course using approved pre algebra curriculum
- Earn ‘exceeds standards’ in math CAASP for the respective year requested
- Score ‘At or above grade level’ for 8th grade on ‘end-of-year’ view of local assessment (i.e. iReady)

Junior High students requesting to take a high school-level world language course must meet two of the following eligibility requirements:

- Student earns a "meets standards" on their CAASPP ELA for the respective year requested.
- Student earns an 85% or higher in English on their report card.
- Student completes a middle school LOTE course with an 85% or higher.
- Student demonstrates fluency in reading or writing in a LOTE.
- Student receives a recommendation from their Teacher of Record or former teacher.

All junior high students may enroll in a junior high or middle school level language course using instructional funds. No credit will be given on the transcript.

Junior high students may submit the course/s for approval, by following these steps:

- Student requests to take high school math and/or world language course/s with their ToR
- ToR completes the Survey for Advanced Courses
- High School Department will review each request to verify eligibility
- If approved, the high school course(s) will be overseen by the High School Department
- The course(s) will be indicated on the Master Agreement for credits, not weeks
- If a student wishes to take an honors-level math and/or world language course, in addition to requesting approval for the core course, they must also request for the honors designation. Please refer to the above honors request process. Upon approval for an honors-level math and/or world language course, students must follow Excel Academy honors requirements for this designation. The GPA will not be weighted because these courses do not count toward graduation credits
- Course/s must be approved by the High School Administration. Junior high school students will have to follow the same add/drop policies as high school students (see above policies).
- Transfer junior high students must show proof of current course enrollment from their previous school via their transcript in order to maintain a high school-level course approval.
- *Per the CA Dept. of Education, junior high students who take Algebra 1 or higher math and/or world language courses are still required to complete courses in both the respective high school math and world language required categories while in grades 9th-12th. Thus, high school-level courses taken in junior high do not count towards the 220 credits required for graduation.*

Sample Compliance:

1) Include the student's first name as it appears on MA - This can also be a nickname, if it makes sense. For example, Michael may appear on the MA, and Mike is fine for the sample. If the student's name is Jennifer and they write Carol, that will not work.
2) Include the full course title as it appears on the MA - Example Algebra 1 not math - if a teacher forgets the A or the B for a course, and the intended class is clearly evident, sample will be accepted.
3) Include the LP #.
4) Scan the document to make sure it is free of religious content. Content may include reference to religion only from an academic perspective.
5) Assignment must meet grade-level standards – readings must be high school level and work must reflect high school caliber.
   Pro Tip: If you are unsure if the literature is high school level, try the following search tools (lexile.com, download apps such as Levelit or Literacy Leveler)
6) Grade the assignment – This should be done by the parent/teacher but must be completed by the ToR if the parent does not grade the assignment (ToR can override if they disagree - they have final say). Do not cross out the parent grade. Simply write the "teacher grade" alongside.
7) If the sample is an essay, written book report, science lab, or major project and earned an A, it needs a rubric to show the grading – see rubrics in specific folders in Shared Drive>HSD.
8) There must be some indication for why a student earned the specific grade. For example, if a student earns a B-, it needs to be clear why they received a lower grade. This can be accomplished through teacher comments.
9) Page numbers are not necessary. However, if the work on the sample appears to be an insufficient amount of work for a high school course, then note page ⅛, for example.
10) Label all pages for work samples with more than one page (Name, LP, subject).
11) Assignment must show work (ie. math problems worked out, full sentence explanations for history and English).
12) Online work samples do not need additional work shown; the work printed from the online assignment or activity is sufficient.
13) Refer to the ToR Training Manual *Compliance* section for more details and the Compliance FAQs doc for answers to difficult and common questions.

The Compliance Coordinator (CoCo) Team

and their role in helping ToRs

1) **Checking curricula** – Compliance Coordinators, in conjunction with the Education Coordinators will verify if the new curriculum is acceptable to use. **Checking state standards** – All curricula needs to adhere to the current CA state standards. The CoCo for each specific subject will verify that the course closely aligns with the state standards.
2) **Checking monthly samples** -Every month the CoCos look at each uploaded high school sample to review for compliance and credibility. Each sample is either accepted or rejected. When you open SIS and notice a rejected sample notification, this is a notification that changes need to be made to the sample. Enter the sample section and click on the rejected sample. A note from the team will indicate what needs to be corrected. Please make the correction/s and reupload the new sample.

There is no need to email the CoCo that your sample has been corrected.

Secondary Cocos - Use these teachers to assign "HQT" for high school classes

English – Forest Muther
Math – Wendy Pendergraft
Science – Kim Platler
Social Studies – Jill Stowe
Spanish – Jill Stowe
VAPA –

ToR Responsibilities –
Each ToR is responsible for the following:

1) Helping new students HS New Student Checklist
2) Ensuring every student uses an approved curriculum from HS Curriculum Handbook
3) Filling out the Course of Study Elementary Doc or the Course of Study Secondary Doc
4) Adding course name to MA - TK - 12th missing student classes/curriculum
5) Bring the following to your first meeting: Curriculum Content for each course, copy of the Plagiarism Academic Honesty Pact for student to sign, Parent Letter and Google Fact Sheet.
6) Creating a Google Classroom
7) Creating a pacing guide for each course
8) Weekly checking online course work; highlighting which items have been completed; identifying which items student plans to complete for the next month
9) Monitor monthly progress for both online and textbook courses.
10) Viewing a body of work and collecting multiple samples (may need as backup)
11) Ensuring that students submit two essays each semester to Google Classroom to run through the plagiarism checker. Additionally, two science labs are required each semester as monthly samples.
12) Discussing grades ~ current progress & anticipated progress – keeping a written log or gradebook
13) Providing support to struggling students using the levels of support spreadsheet
14) Identify any students working at a 70% or below on a monthly progress doc.
15) Keeping written log of concerns in portal and creating a student support log (this will make any SST meeting much more successful and productive)
16) Students are required to take one CHYA course in junior high school and once when in high school. Parents can OPT OUT via email/letter. Place in SIS notes and archive.
17) Reviewing each sample for the following – proper heading, legible, enough work to merit a passing grade, no religious content, incorrect answers or work are marked accordingly, and an accurate grade with rubric when needed

18) Proctoring A-G online final exams in the fall and spring.

It is the ToR's responsibility to be checking in with HS students on a weekly basis. Specifically for online courses, it is important to view the 'score to date' which is the most accurate grade the student has in the course. Example: If a student is showing 87% as their current grade, but only completed 36% of a course, that just means their average grade on assignments is a B. However, if you add in the zeros for the incomplete work, the student would actually be receiving an F in the course. To sum up: The 'score to date' shows the actual grade with the zeros included.

Shared Drive High School Folder

- High School Helpful Hints Doc
- Detailed list of documents found in the ToR Manual and in the Shared Drive - High School - HSD.

Assessments

Assessment Section Overview

- Assessment Contents found in the ToR Manual and in the Shared Drive - Assessments - ASMT.
- Assessment Details (State and internal testing, proctoring, etc.)
- Assessment Guide for Parents - Share with parents at LP 1 - The parents receive this document when they sign the MA, etc. However, since they are reading and signing so many documents at once, it is crucial for the ToR to review this document with every parent explaining how it applies to each student at various grade levels.
- Protocol for Opting Out - MUST READ before discussing assessments with parents

Shared Drive Assessment Folder

Alternative Assessment Directions Folder

- Directions to administer alternative assessments in lieu of i-Ready

Assessment Folder

- Details pertaining to all state and internal assessments
- Assessment Guide for Parents - Share with parents at LP 1
- Opt Out Protocol - MUST READ before discussing assessments with parents
- Test Prep Information
- CAASPP Test Security Form - Collect ONE per family - If testing in person

- Testing Technology Loan Agreement

Goal Setting Folder

- Fall Goal Setting Student Form
- Spring Goal Setting Student Form
- Promoting Self-Efficacy and Goal Setting Across All Grade Levels PowerPoint

i-Ready Information Folder

- Directions for ToRs to get started with i-Ready
- Parent Tutorial
- i-Ready Certificates
- i-Ready Shared Doc. - used to add students, make edits, and indicate opt outs, etc.
- ToR Documentation of i-Ready Completion- Must complete monthly
- Letter to Parents Explaining i-Ready
- Directions to Administer the Alternative Assessments
- FAQ - i-Ready Accessibility

K/1 Benchmark Assessment Folder - in lieu of i-Ready

Fall and spring assessment directions, assessments, answer keys, and word count per minute chart

Math Placement Tests Folder

- Algebra and Geometry Placement Tests - administered by the ToR

PFT Folder

- Directions for administration of the PFT by the ToR
- Data Collection Sheet
- PFT Fillable Form - shows exercises and can be provided to parents

Report Card Folder

- Grading Scales
- ToR Directions
- FAQ
- Progress Reports
- Sample Completed Progress Report
- Fall and Spring Letters to Parents
- How to Create a Report Card

ToR Student Tracking Spreadsheet Folder

- ToR Student Tracking Spreadsheet - **HIGHLY ENCOURAGED TO UTILIZE - MAKE A COPY FIRST!**

TK-5 Students - REQUIRED for students in grades TK-5

Report Cards

Report cards are required for students in grades TK - 12. Please have the necessary discussions with parents prior to grading so parents are aware of the grades prior to receiving the report card(s). The grades administered on the report card are final, as determined by the ToR and the administration. Please refer to the *Grading Scales* document (included in the handbook and shared assessment folder) and the directions for administering grades.

Grading Scales

TK-5 Students
The 4 – 1 grading scale that Excel Academy implements will give parents a clear understanding of student performance and progress.

4 Exemplary – Student consistently demonstrates an in-depth understanding of the standards, concepts, and skills taught during this reporting period. Student is working above grade level and produces outstanding work with little help or reteaching.

3 Proficient: Student consistently demonstrates an understanding of the standards, concepts, and skills taught during this reporting period. Student is meeting grade-level expectations, and able to complete assignments with appropriate amount of instruction and assistance.

2 Approaching Proficiency: Student is approaching an understanding of the standards, concepts, and skills taught during this reporting period. Student is working towards grade-level expectations. Student requires many tools and reteaching to understand concepts being taught, works at a slower pace, or works slightly below grade level at a faster pace.

1 Non-proficient: Student does not yet demonstrate an understanding of the standards, concepts, and skills taught during this reporting period. Student is working far below grade-level expectations. Student may have difficulty understanding new concepts.

***Please understand that a student who earns a "3" is at grade level and is where he/she needs to be working at this time. A student who earns a "4" is working above grade level and consistently provides excellent work in all areas of the course.**

Grades 6 – 12

Students in grades 6 through 12 will earn grades using the standard A-F scale (see below). Grades will be specific to the grading scale.

*Outstanding performance in mastery of the subject. Achievement of superior quality.
98 - 100 = A+
93 - 97 = A
90 - 92 = A-

*Consistent performance in achievement beyond the usual requirement. Achievement of high quality.
88 - 89 = B+
83 - 87 = B
80 - 82 = B-

*Performance meets grade-level standards and expectations. Achievement suggests sufficient understanding of the subject/course.
78 - 79 = C+
73 - 77 = C
70 - 72 = C-

*Minimally acceptable performance of course-level material. Achievement suggests below-average understanding.
68 - 69 = D+
63 - 67 = D
60 - 62 = D-

*Achievement is at a level insufficient to demonstrate an understanding of the basic elements of the course and will not count towards graduation requirements.
59 and below = F

*****Students taking online A-G courses or Community College courses will be graded by the instructor teaching the course**

OPTING OUT OF STATE TESTING

As TORs and representatives of a state funded charter school, we want to discourage parents from opting out students from testing, and emphasize the positive aspects of test taking. Please refer to the information provided below to help you address this subject if necessary.

Q: Are there specific forms approved for opting out?

The answer is **NO**. There are many created forms found online, but there is not an official form for opting out of state testing.

Q: As employees of Excel Academy, why is it important to encourage state testing?

The state has issued a mandatory 95% participation rate for state testing. It is our role as teachers to encourage and educate our families to participate in testing. Opting out of state testing cannot be an option. Effective during the 21/22 school year, if CAASPP participation rates fall below 95%, our charter school will suffer significant penalties when it comes to reporting the school's performance measurement. Students who do not participate in testing will ultimately be assigned the lowest scale score possible which will hinder the overall performance score of the school. Charter Schools who are designated as low performing are subject to non-renewal. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families. We want to work together to continue to provide a one of a kind top notch educational experience for our students.

Q: What can we share with parents to encourage participation in state testing?

We must let parents know that instructional funds and our charter are dependent upon participation in state testing. State testing is the primary way data is gathered to show stability and growth in a school. **Without data and accountability, districts do not want to hold a charter; therefore, Excel Academy could be at risk.**

Please reiterate the following message to parents/guardians.
Effective during the 21/22 school year, if CAASPP participation rates fall below 95%, our charter school will suffer significant penalties when it comes to reporting the school's performance measurement. Students who do not participate in testing will ultimately be assigned the lowest scale score possible which will hinder the overall performance score of the school. Charter Schools who are designated as low performing are subject to non-renewal. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families. We want to work together to continue to provide a one of a kind top notch educational experience for our students.

Excel Academy is successful in making testing a fun and positive experience for the students and the parents. We want to encourage and support parents and assure them that there is nothing to be afraid of. We must be very mindful of our delivery and attitude and how much that will influence the decisions our parents make. If a parent is negative about state testing, ask the parents what their concerns are and work to address them through understanding, compassion, and education.

- Share with parents that testing is an important life skill.
- Results from testing can be helpful in guiding curriculum choices and instruction.
- Parents have the right to choose if they want to share the test scores with their student(s).
- The experience of test taking is important.
- In person testing - TBD - More than likely we will remain virtual.
    - The testing sites are safe, and our students are monitored and supervised by our credentialed teachers and staff in and out of the testing rooms, outside of the restrooms, and in the snack area.
    - Parents are welcome to stay at most of the testing locations outside of the testing rooms, and can carpool to the designated locations.
- The state requires 95% participation in state testing or Excel's charter could be at stake.
- The state provides the funding for Excel Academy's charter which is passed down to Excel families through instructional funding. Without a charter, our families would not have the instructional funding to enhance their students' education through purchased curriculum, materials, and vendor courses.

Q: Is there a consequence for students who do not participate in state testing?

Although it is the parent or legal guardian's right to opt out of state testing, as a public charter school, Excel Academy is required and legally has the right to request data for all students to show academic growth and progress.

If testing is in person, participation in an alternative assessment *at the testing location* for the required two days will need to be enforced. If testing is virtual, ELA and math testing will be separated over two set sessions.

*****IMPORTANT*****

When do we mention the alternative assessment to state testing to parents who want to opt out their student(s) from state testing?

The alternative assessment can only be suggested if a parent strongly refuses participation in the state assessments AND is starting the opt out process described below.

1. **DO NOT mention the alternative assessment prior to having parents understand the importance of state testing.**
2. **We DO NOT want our Excel Academy families to choose the alternative assessments in lieu of state testing.**
3. **Excel Academy DOES NOT receive participation credit from the state of California for these internal assessments.**

4. **CAASPP results are reflected on the state's dashboard, not internal assessments.**

Parents who decline the alternative assessments are to be notified that their student(s) will earn a PIN for EACH assessment that is not completed.

What is an alternative assessment?

- An alternative assessment will be issued in both math and language arts.
- The paper pencil assessments will cover grade level standards and will be multiple choice and some fill in completion.
- The assessments will be completed and graded, and parents will be notified of the scores. Parents will not receive copies of the assessments, as these tests are the property of Excel Academy.

Where do students take the alternative assessments?

If in person testing takes place, parents of students taking the alternative assessments will register as they would if their students were taking the state assessments. They would choose a testing location and two dates to attend (one for math and one for language arts). **STUDENTS WILL NOT BE ALLOWED TO TAKE THESE ASSESSMENTS AT AN LP MEETING OR ANOTHER LOCATION. These students will be treated equally to those who are taking the state assessments.**

If virtual testing resumes, ToRs will set two Zoom sessions to test their students in ELA and math.

Does the TOR need to notify the Director of Assessment and Accountability if a student is opting out of the state assessments, but has agreed to take the alternative assessments?

Yes, the Director of Assessment and Accountability will need to be informed by the ToR that the student is taking the alternative assessments either at the specific location (in person) or via Zoom (virtual) and the specific dates to ensure that the Director of Assessment and Accountability provides the assessments on time.

Can a student earn a PIN for NOT participating in state testing?

We cannot issue a PIN for a student who does not participate in state testing because parents have the legal right to opt out. **HOWEVER**, because Excel Academy has the legal right to assess students "in house" and collect data showing progress and growth, and is required to do so by the Governing Board and districts holding our charters, we can issue a PIN for each day the student does not show up to one of the designated testing locations to take the alternative

assessments. **Students can earn two PINS for not participating in both language arts and math alternative assessments at the testing locations or virtually.**

Example - A PIN will be administered if a student does not take the math alternative assessment. A PIN will be administered if a student does not take the language arts alternative assessment.

Will PINs be given to students who are "no shows" at testing and make-ups?

Yes, this policy will also hold true for students who are "no shows" at testing and make-ups.

What are the proper steps to handle parents who insist on opting out of state testing?

Parents will need to follow the opt out process AFTER the ToR has tried to encourage participation AND has explained the alternative assessment.

All parents of students who opt out of state testing will need to complete the following steps to submit an opt out notification to Excel Academy's Director of Assessment and Accountability. (Including parents of students who choose to have their students participate in the alternative assessment.) These opt out letters will be filed in case of an audit.

If the family is persistent about opting out, inform the parent that a letter **MUST** be submitted via email to the Director of Assessment and Accountability.
Letter MUST include:

- Student(s) names
- Grade level(s)
- Parent Name
- Waiving - **ALL** CAASPP testing (SBAC Math, SBAC ELA & CAST Science for grades 5, 8, or grade level determined by the state of California) **OR PART** of testing and **MUST SPECIFY** which test(s)
- Include whether or not the student will be taking the alternative assessments in lieu of state testing at a designated testing location (if in person) or via Zoom (if virtual).

Please reach out to the Director of Assessment and Accountability if you have any questions. **As the TOR, it is your responsibility to share all aspects of testing with your families, including the PIN policy, prior to the Director of Assessment and Accountability contacting the families.**

State and Local Assessments

(CAASPP, ELPAC, PFT, and i-Ready)

Standardized Testing

The California Assessment of Student Performance and Progress (CAASPP) is the state-mandated academic testing program. All charter schools are required to administer the CAASPP as well as other state-mandated assessments such as the ELPAC and PFT (Ed. Code, § 47605(c)(1). CAASPP is a system intended to provide information that can be used to monitor student progress on an annual basis and ensure that all students leave high school ready for college and career. Following the spring of each year, individual student test score reports are provided to parents. Student score reports will include an overall score and a description of the student's achievement level for English Language Arts (ELA) and mathematics.

In California, parents may opt out of state mandated academic testing by submitting a written request to the school each year, but this only applies to the state mandated assessments. *We do not recommend opting out.* There is no law permitting a parent to opt out of the school's internal assessments, and therefore, students are required to participate in all internal assessments. Every ToR MUST read the document titled Excel Academy - Protocol for Opting Out of Assessments 23-24- ASMT located in the shared drive under assessments.

Charter schools exist in a performance-based accountability system where they are held accountable for student academic performance. In fact, a charter school cannot continue to exist without collecting data on students' performance on a variety of assessments and indicators. When a charter authorizer is evaluating whether to revoke a school's charter, or 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).) Therefore, it is important during the revocation and renewal processes for a school to gather as much positive academic achievement data as possible to show progress in student performance. Evaluating graduation, attendance, suspension, and English Learner (EL) reclassification rates are also ways to show student progress. However, student participation and performance on state mandated assessments is by far the most common and used method, and results are indicated on the California School Dashboard and System of Support. The Dashboard is a powerful online tool to help districts and schools identify strengths and weaknesses and pinpoint student groups that may be struggling (https://www.cde.ca.gov/ta/ac/cm/). Your student's participation in state mandated assessments is highly encouraged and recommended. **Please remember that results and attendance from all state tests are directly tied to school funding per recent LCFF legislation and are an integral part in maintaining partnerships with our chartering school districts.**

If you have any questions, please contact Excel Academy's Director of Assessment and Accountability, Jenny Craig at jcraig@excelacademy.education.

Proctoring

- ToRs will proctor the i-Ready assessments virtually. For specific details, see Assessments-ASMT > i-Ready Information
-
    - i-Ready proctoring will be done by ToRs
    - Testing window #1 - 9/5 - 9/18 - ALL K- 11th GRADE STUDENTS
    - Testing window #2 - 11/6 - 11/17 WIN AND SHORELINE STUDENTS ONLY & THOSE WHO CHOOSE TO TAKE A MID-YEAR ASSESSMENT
    - Testing window #3 - ¾ - 3/15 - ALL K - 11th GRADE STUDENTS
    - Each testing window will begin with 5 days for math, 5 days for reading, and 5 days for make-ups.
    - ToRs will create their own schedules for testing (i.e. block two hours per day for students to attend a Zoom session - students will login on their own)It is highly suggested that ToRs test students the first two weeks of each window and team with other ToRs to proctor.
    - As of July 18, 2021, Google Chrome Versions 80 and below will no longer be able to access the i-Ready Platform. Students will have access to borrowing an EACS computer if needed.

- ToRs will proctor CAASPP assessments
    - CAASPP proctoring days will be based on student enrollment and the need of 1:1 test takers. The SPED team will proctor students with 1:1 accommodations provided the students have current IEPs. The number of necessary ToR proctoring days assigned are not set at this time if the state moves forward with in person testing. If EACS continues with virtual testing, ToRs will resume testing students on their own. It is highly suggested that ToRs work with other ToRs to create a schedule and share the proctoring responsibilities.

English Language Proficiency Assessments for California (ELPAC)

The English Language Proficiency Assessments for California (ELPAC) is aligned with the 2012 California English Language Development Standards. The ELPAC consists of two separate assessments: one for the initial identification of students as English Learners (ELs) and a second

for the annual summative assessment to measure a student's progress in learning English and to identify the student's level of ELP (cde.ca.gov).

- Grades K-12 - TK students take the kindergarten assessment
- English Learners only
- Test Administration
    1. Initial Identification - When student enrolls with Excel Academy - Dates and Locations TBD (Assessment will be administered by trained proctors.)
    2. Annual Summative Assessment - Beginning in the Spring
- Results are provided by the California Department of Education and sent to the school. Once received, parents will receive a letter explaining student score reports.

English Learners (ELs)

ELs are targeted for ELPAC testing when the Home Language Survey indicates that their primary home language is a language other than English and are tested during the school year.

- Excel Academy students are in an English Language Mainstream academic program with an English Language Development (ELD) Support Curriculum. The mainstream curriculum is taught and/or supported by CLAD certified teachers and includes vocabulary and visual thematic-based support. ELs are accommodated within this curriculum by providing multiple opportunities to demonstrate mastery on all assessments, including writing assignments.
- Progress in their assigned ELD curriculum is monitored weekly by the ToR. Excel Academy requires students to participate in both synchronous and asynchronous instruction for a total of 150 minutes each week. ***Questions pertaining to ELD curriculum can be directed to Tamara Murphy, Intervention Coordinator.***
- Both the parent, as the primary educator, and the ToR are responsible for ensuring adequate progress through the ELD curriculum.

Criteria for Reclassification to Fluent English Proficient (RFEP)

In order to be reclassified to Fluent English Proficient (FEP) and exit the EL program, students must meet the following criteria:

- Minimum ELPAC overall score of 4
- Teacher Evaluation
- Parent Approval
- CAASPP - Smarter Balanced and/or Local Assessments (i.e. i-Ready) can also be used in determining student readiness for redesignation

CAASPP - California Assessment of Student Performance and Progress

California Science Test (CAST) – Computer Based Assessment

- The California Science Test (CAST) is an online test based on the California Next Generation Science Standards (NGSS).
- Participation in the CAST is required for all students in grades five and eight and for the pre-selected high school grades.
- All local educational agencies (LEAs) with eligible students in grades five and eight will administer the CAST. LEAs with eligible students in high school (i.e., students in grades ten, eleven, or twelve) will be pre-selected to participate in the spring assessment. The CAST uses the current California Assessment of Student Performance and Progress test delivery system and will only be administered online (www.caaspp.org).

Smarter Balanced Assessment Consortium (SBAC) – Computer-Based Test

With new state standards, students are working harder, thinking more critically, and applying their learning to the real world. To measure these new standards, educators from states using Smarter tests have worked together to develop new, high-quality tests in English and math for grades 3–8 and 11. Using computer adaptive technology, the tests are customized to every student (smarterbalanced.org).

- Grades 3 - 8 and 11
- ELA and Math – Computer Adaptive Tests (CAT)
- ELA and Math – Performance Tasks (PT)
- CAASPP - SBAC spring testing - Dates and Locations TBD
- Registration for the SBAC ELA/MATH/CAST will take place with the ToR.Information will be emailed to parents in February.
- At testing sites, whether in person or virtual, cell phones are highly discouraged, and *no* electronic devices are allowed during testing, including smart watches.
- If testing is in person…
    - Parents are notified when students have completed testing by a proctor at the site.
    - Parents are welcome to stay in the waiting area at most sites, but are not allowed in the testing rooms.
    - Technology usage by students is prohibited in the designated testing areas.
    - Photo ID may be *required* at pick-up.
    - Siblings picking up students MUST be old enough to have a photo ID and must be identified at the time of check-in.

- Students may bring water and lunch to testing in a clear bag. Backpacks are not allowed.
- Students will be encouraged to take breaks during testing (i.e. restroom and snack breaks).
- Parents MUST review this information with their students.

Student Testing Participation Requirement

All students currently enrolled in Excel Academy are required to participate in the aforementioned tests (where applicable). Failure to participate or satisfy the above requirement with alternative paper-pencil assessments will result in Progress Improvement Notifications (PINs) being issued to the student. Please refer to Excel Academy's Progress Improvement Notification Policy and Opt Out Protocol document in the ToR manual. ToRs will need to reach out to the Director of Assessment and Accountability to issue a PIN. Once approved, the ToR will follow the guidelines of administering a PIN.

Smarter Balanced Assessment Consortium (SBAC) and California Standards Tests (CAST) for Science

Please refer parents to the *CAASPP Practice Tools for Students* document located in this manual, as well as the parent and student handbook and Excel's website. All ToRs should provide this document to their families prior to testing.

Please note that some of the practice tests do not provide answers or a score; however, it does provide your students with the experience of navigating through a sample test session, which is important to practice.

There are four major types of questions that students may see: multiple choice, multiple response, short answer, and performance assessments. Encourage your families to explore and discuss the practice tests with their students.

Physical Fitness Test (PFT) – California

The Healthy Fitness Zone standards are available on the California Department of Education Physical Fitness Test FITNESSGRAM: Healthy Fitness Zone Charts Web page. http://www.cde.ca.gov/

OPTING OUT OF REQUIRED ASSESSMENTS

Can parents opt out of the Physical Fitness Test (PFT) according to the California Department of Education?
The answer is no. There will not be an alternative assessment given in lieu of the PFT; therefore, the student will earn a PIN for not participating.

The general opt-out provision of California Education Code Section 60615 does not apply to the PFT. There are a limited number of allowable reasons for not participating in parts or all of the PFT (e.g., medical excuse, student with disabilities); therefore, most students cannot be excused from the PFT.

Can parents opt out of the ELPAC?
The answer is no. EL students will continue to be classified as English Learners until they pass the ELPAC as Reclassified Fluent English Proficient (RFEP).

Can parents opt out of i-Ready benchmark diagnostic assessments? The answer is yes, HOWEVER, ToRs need to discourage opting out of the i-Ready benchmark assessments because the data provided is valuable for the progress and growth we want our students to achieve. i-Ready provides data that will assist with course planning, curriculum and materials, SST evaluations, IEP evaluations, and data that can be shared with the Governing Board and districts holding Excel Academy's charters. If a student opts out of i-Ready and does not complete the assigned alternative assessments in ELA and math, a PIN will be administered.

Are there alternative assessments that ToRs need to offer if parents opt out their student(s) from taking the i-Ready benchmark assessments?

YES! If parents choose to opt out of the i-Ready benchmark assessments, alternative paper pencil assessments in reading and math MUST be offered to avoid earning a PIN.

One PIN will be administered if a student does not take both required assessments (either i-Ready or alternative paper pencil assessments) during the set testing windows.

Who administers the paper pencil alternative assessments?
The ToR will administer the paper pencil alternative assessments.

What is the process to obtain the paper pencil assessments?
The ToR will need to notify the Director of Assessment and Accountability and request the paper pencil assessments through a shared Google document.

- name(s) of student(s)
- grade level(s) of student(s)

- reason for not taking the i-Ready benchmark assessments

The Director of Assessment and Accountability will email the assessments to the ToR and the ToR will make arrangements to proctor the tests in person or virtually at an LP meeting or another time and location.

Who will grade the alternative assessments?
Directions for administering and grading the alternative assessments are located in the shared assessment folder.

The ToR will be given the answer keys to the assessments provided by the Director of Assessment andAccountability . A grading template will be shared with the ToR to complete and provide to the parents.

ToRs of EL students will need to provide the results on the shared spreadsheet, as well as to Jenny Craig. Tamara Murphy and April Saade will need to be informed of any student who falls below grade level and is in need of support and interventions.

IMPORTANT
The alternative assessments do not provide the same level of feedback and results as i-Ready. Although the alternative assessments will provide necessary grade level information, i-Ready benchmark assessment results provide a greater, in-depth understanding of the students progress and gaps seen across grade levels due to the fact that i-Ready tests are adaptive diagnostics, and result in individualized lessons to assist students further.

Furthermore, ToRs should highly encourage their students to complete the individualized i-Ready lessons.

Assessment Guide for Parents

ToRs are responsible for providing a copy of the *Assessment Guide for Parents* (included in handbook) to each family at the first LP meeting. This form shows the tests that are required at each grade level. ***Parents/guardians will Docusign this document along with other essential forms; however, it is important to review the assessments in person.

- The ToR will indicate the students' names next to their grade levels and highlight the required assessments.
- One copy per family.
- Parents must sign the form indicating they have been notified of the required assessments.
- This document is a great tool for parents to refer to and begin a conversation about assessments. The parent will take the signed copy home.

Testing Resources

For additional information regarding assessments, please refer to Excel Academy's website under *Our Academy* and *Assessments*. For **CAASPP AND ELPAC practice tests**, please refer to *Parent Tools* and *Assessment Resources*. Excel Academy provides the following resources to students:

- Online practice tests links
- EACS created grade level paper pencil assessments in ELA and math
- Virtual test prep sessions

CAASPP Testing Security Form - If testing in person

ToRs must have each family complete one *CAASPP Testing Security Form* once families have registered for state testing. This form will be kept at the testing location in case of an emergency.

- The Director of Assessment and Accountability will notify all ToRs when the forms are due.

Proctoring of State Assessments

Virtual Testing:
ToRs are highly encouraged to work with other ToRs to create virtual testing sessions that are flexible and offer students choice in terms of available times. Multiple sessions over the course of the testing window should be offered to best meet the needs of all students. ToRs are 100% responsible for ensuring the completion of their students assessments.

In Person Testing:
Each year, Excel Academy participates in state testing at various locations throughout Southern California. The Director of Assessment and Accountability works to organize testing locations and a proctoring schedule that best meets the needs of all students. For this reason, it is essential that we have ToRs working together to assist our students. Depending on the number of students registered for the testing sites, Excel Academy teachers will be assigned proctoring days based on student needs. While we try to place teachers at the closest locations to their homes, there will be times when teachers will need to drive quite a distance to proctor at various locations. We try to inform everyone of these location assignments well in advance, in order to allow for scheduling and childcare arrangements.

While we completely understand that sickness is out of the control of the teacher, and a teacher may be sick on an assigned proctoring day, it is the responsibility of the teacher to find someone to take his/her place. In addition, the teacher will need to take a sick day in Paycom and also proctor on another date to make-up for the missed proctoring day. If the teacher is unable to swap proctoring dates with another colleague, please note that the make-up proctoring day may or may not be at the same location, and could possibly be during make-up testing. The Director of Assessment and Accountability will do their best to place the teacher where they feel is necessary and in the best interest of the students. Make-up testing days will be scheduled once the coordinators solidify the number of students needing to test and the locations for testing. State testing is indeed a positive experience and would certainly not be as successful without the support of our Excel Academy Team.

Physical Fitness Test – California

The PFT provides information that can be used by (1) students to assess and plan personal fitness programs, (2) teachers to design the curriculum for physical education programs, and (3) parents and guardians to understand their children's fitness levels. The program also provides results that are used to monitor changes in the physical fitness of California students. By law (Education Code (EC) Section 60800 public schools are required to administer the PFT annually to all students in grades 5, 7 and 9 (cde.ca.gov).

- Grades 5, 7 and 9
- Dates vary in February through May
- The PFT is administered by the ToRs. ToRs will provide Excel Academy's Director of Assessment and Accountability with the results for each student tested. A data collection form will be provided prior to testing.
- Accommodations for Special Education students will be outlined in their IEPs or 504 Plans.
- If a parent states a student needs additional support, the ToR will need to notify the Director of Assessment and Accountability to verify accommodations.

Testing Includes:

1. Aerobic Capacity – One Mile Run
2. Abdominal Strength and Endurance – Curl Up
3. Upper Body Strength and Endurance – Push Up

4. Trunk Extensor Strength and Flexibility – Trunk Lift
5. Flexibility – Shoulder Stretch
6. Recording of Height and Weight

PFT Collection Data Sheet

ToRs are responsible for administering the PFT assessment to the students on their individual rosters in grades 5, 7, and 9. Specific details will be provided to all ToRs by the Director of Assessment and Accountability in advance in order to begin preparation for testing.

Please plan a day and location (i.e. convenient park) to assess your students' ability to run a mile, to do curl-ups, trunk lifts, push-ups, and the shoulder stretch. **ToRs may not assist the students on any of the exercises. This includes holding feet down during curl-ups. All exercises MUST be completed solely by the students. In addition, parents are not allowed to test the students or assist with testing while students are taking the PFT assessment.** Please refer to the *PFT Fillable Form* (included in the handbook and shared drive under Assessment) for you to see the directions for each individual exercise. Please remember to bring a ruler to measure the trunk lift, make a strip of paper for students to use as a marker for their hands for the curl-ups, and a stopwatch to record the minutes and seconds for the mile. **You do not need to document anything on the *PFT Fillable Form*. Please email it to your families, so they can see each exercise and can practice at home in advance. Your documentation will be on the *PFT Collection Data Sheet*.** ToRs will document the information for each student on this sheet and email the document to the Assistant Director of Assessment andSpecial Programs.

The Director of Assessment and Accountability will keep the ToRs informed regarding the testing window and due date for the *PFT Collection Data Sheet*.

Recommendation - Try to buddy up with a few other ToRs to test your students together. The experience is even more enjoyable when you are working with others to create a low-key, positive environment for your students. For instance, in the past, groups of ToRs held the PFT at a nearby park on a designated weekday and everyone worked together to assess students. It's a great idea to go early and map out the one mile run.

When you are emailing your families about your specific testing date and location, please make sure to ask the families to be on time and have each student prepared with running shoes, a water bottle, a towel or an exercise mat (only if the student already has one), and comfortable, breathable athletic attire.

i-Ready Benchmark Assessments – Computer Based Tests - (K-11)

i-Ready benchmark assessments are adaptive diagnostic tests that will indicate mastery and identify learning gaps in students K-11. This particular assessment will be given in the fall to provide ToRs and parents pertinent knowledge to assist with academic support and guidance,

mid year to those who are in the WIN program and want to retake the assessments, and in the spring to determine growth and goals prior to state testing.

- Test Administration –

  When we report our data, the data reflected is always in *standard view.* ***Although there are paper pencil assessments in lieu of i-Ready for students in grades K-11, PLEASE encourage ALL of your students to take the i-Ready assessments and utilize the personalized lessons (available for grades K-8). The i-Ready data that is collected is essential for telling our story to our stakeholders, on the LCAP, etc.

  Benchmark Diagnostic #1 - FALL

  - All students in grades K-11 are required to take the i-Ready benchmark assessments (ELA and math).
  - ToRs will proctor students virtually!
  - IF a student has specific accommodations outlined on the IEP/504 AND the SPED team/504 Coordinator deems it appropriate for the accommodations to be applied to the i-Ready assessments, the ToR MAY need to proctor the student in person.
  - The results shared with the parents/students will be in *standard view* only!
  - **Please see the Intervention section for WIN and Shoreline student identification.
  - ALL students need to be encouraged to complete the personalized i-Ready lessons that are provided upon completion of the ELA and math assessments.

Benchmark Diagnostic # 2 - WINTER

- ONLY students who are in WIN (falling into tiers 2 and 3 on benchmark #1) and identified as Shoreline will be required to take the second benchmark assessment.
- This will give WIN and Shoreline students an opportunity to test out if they have made sufficient progress. See the Intervention section for details.

- ToRs will ONLY proctor students on their rosters who are WIN or Shoreline students, unless a tier 1 student chooses to retest.
- The results shared with the parents/students will be in *standard view* only!

Benchmark Diagnostic #3 - SPRING

- All students in grades K-11 are required to take the i-Ready benchmark assessments (ELA and math).
- ToRs will proctor students virtually!
- IF a student has specific accommodations outlined on the IEP/504 AND the SPED team/Intervention Coordinator deems it appropriate for the accommodations to be applied to the i-Ready assessments, the ToR MAY need to proctor the student in person.
- The results shared with the parents/students will be in *standard view* only!
- **Please see the Intervention section for WIN and Shoreline student identification.

Important -

- Newly enrolled students will be required to take the i-Ready assessments immediately upon enrollment.
- ToRs will provide the student's score report/data to parents once students have completed both reading and math assessments.
- ToRs will encourage their students to consistently complete the individualized lessons.

*****Alternative paper pencil assessments are available for students in K-11 who opt out of taking the i-Ready assessments. PLEASE ENCOURAGE i-READY TESTING!**

Final Examinations of Online Courses

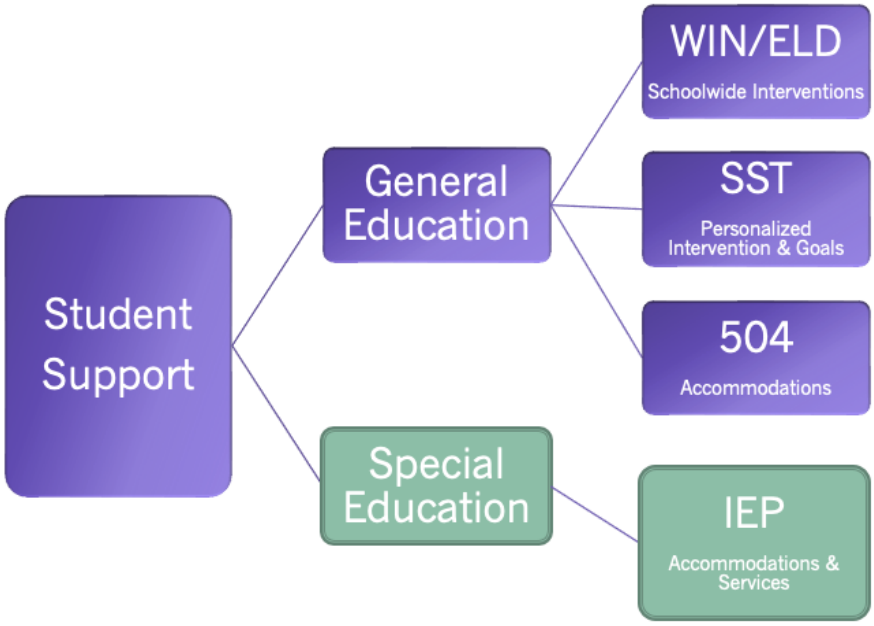
All students taking online courses with final exams that require proctors, will be given the exams in person. They will be administered by appropriate Excel Academy Staff in the fall and spring where applicable. Please reach out directly to the High School team for specific details.

Intervention

Who to Contact

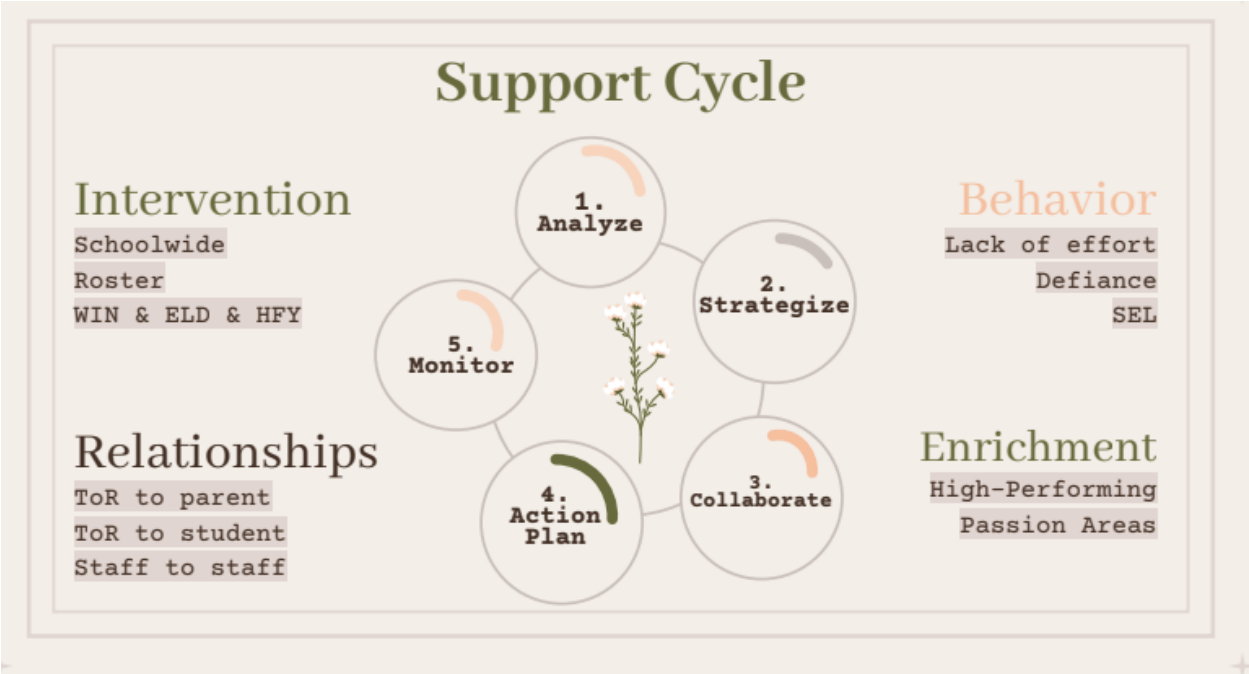
WIN Program	Sarah Horikawa	**WIN & ELD Classes**	Tamara Murphy
WIN Compliance	Sarah Horikawa	**Homeless/Foster Youth**	Tamara Murphy
SST Meetings TK-6	Tamara Murphy	**ELD Program**	Tamara Murphy
SST Meetings 7-12	Alison DeSchaine	**Cultural Awareness**	Tamara Murphy
504 Meetings TK-6	April Saade	**SPED Referrals**	Noell Scott & Tamara Murphy
504 Meetings 7-12	School Counselors	**Acceleration/Retention**	April Saade

Types of Student Support



Support Cycle

The Support Cycle may be used to address challenges in any area. Most often it is utilized with students, yet it may be helpful to implement with families and staff members, as well.



WIN Intervention Program
(What I Need)

Due Diligence

As a Teacher of Record, it is your responsibility to ensure that students are supported and progressing adequately. It is critical that you consistently monitor your students' academic, social, and emotional needs.

- Be sure you support your students with WIN compliance.
- Create a *Student Support Log* and choose interventions that may be helpful
- Share the log with your SST Contact if the interventions are not helping the student make progress.
- **It is critical that you reach out for additional support and request SST (Student Success Team) meetings when necessary.

Who:

WIN program is required for students in **1st-8th grade**
WIN students are identified by i-Ready diagnostic scores.
Students can test into and out of the WIN program with each test (Fall, Mid-Year, Spring). Students required to participate in the WIN program are indicated below:

- Overall score (*standard view*) is **RED**
- Overall score (*standard view*) is **YELLOW** ***AND*** **BELOW 50th percentile** (See National Norm)

What:

- The *WIN Program* is targeted, academic intervention and progress monitoring. Monthly plans are outlined in the **WIN Math Plan** and **WIN Reading Plan**.
- A student's WIN program may also include recommended **WIN Live** small group instruction. Students are selected by the Intervention Team.

Why:

- As educators, it is our due diligence & our moral imperative to ensure that each student can access grade-level standards.
- The state of California requires every public school to have a *Multi-Tiered System of Supports (MTSS)* in place to help at-promise students reach state standards and make adequate academic progress. (https://www.cde.ca.gov/ci/cr/ri/)

Important:

The WIN program is REQUIRED per the *Acknowledgment of Responsibilities* signed in the *Master Agreement***.** Therefore, Parent, Student and ToR participation is required. If students

do not participate in the WIN Program they may receive a PIN (Progress Improvement Notification).

Student Success Team (SST)

Process, Forms, & ToR Responsibilities

TK-6 SST Meetings: Tamara Murphy, tmurphy@excelacademy.education
7-12 SST Meetings: Allison DeSchaine, adeschaine@excelacademy.education

An SST (Student Success Team) is a problem solving group that meets to develop strategies and interventions to assist students with academic, attendance, behavioral, &/or social-emotional challenges. Please refer to the Pre-SST Resources & SST Info & Directions for more information.

English Learners

Curriculum, Policies, & ToR Responsibilities

TK-12 Designation & ELPAC Assessment - Jenny Craig, jcraig@excelacademy.education
TK-12 Curriculum, Instruction, & Support - Tamara Murphy,
tmurphy@excelacademy.education
Compliance - Intervention@excelacademy.education

Designation

Students are designated as English Learners based on their results from the Initial ELPAC assessment. ELs have the opportunity to redesignate if they earn an overall score of 4 on their Summative ELPAC assessment. This assessment is only offered once annually, in the spring. Please refer to the ASSESSMENT section above for further details. The SIS identification for ELs is a red asterisk. Select the asterisk to view current status details, select "tests" to see their ELPAC assessment scores.

ELD Program Requirements

Excel Academy requires all students identified as English Learners to participate in our ELD (English Language Development) Program through both synchronous and asynchronous instruction. Please see the ELD Handbook for ToRs for more information.

Translation & Interpretation Resources

Please refer to our Translation & Interpretation Resources for detailed information.

504 Accommodation Plans

Process & ToR Responsibilities

EACS 504 Coordinator: April Saade, assade@excelacademy.education
TK-6 504 Meetings: April Saade
7-12 504 Meetings: School Counselors

Please view 504 Plans Explained for an overview of 504 Plans. It is important to remember that **504 Plans are a function of general education**, not special education. Most often, new 504 Plans will first be addressed through an SST meeting to gather more information and to determine if a 504 Plan is the proper response to the concern. 504 Plan requests should be addressed in a timely manner to best support the student, parent, and ToR. **Please notify the appropriate 504 contact (listed above)as soon as the possibility of a 504 Plan is discussed.**

Special Education Assessment Requests

IEP Requests: Process, Form, & ToR Responsibilities

School Psychologist: Noell Scott, nscott@excelacademy.education
Intervention Coordinator: Tamara Murphy, tmurphy@excelacademy.education

All special education assessment requests will begin with a *Request for SPED Referral* meeting to document concerns. **If a parent requests a special education assessment, verbally or in writing, please notify the *Special Education Coordinator & cc Intervention Coordinator* immediately**. The Special Education Referral Form will be shared with you. Please fill it out as soon as possible. A meeting will be arranged to gather more information about the referral concerns. We will also clarify how the process works in our model.

Homeless, Foster, Mobile Youth (McKinney-Vento)

Intervention Coordinator:: Tamara Murphy, tmurphy@excelacademy.education

Definition of Homelessness

The McKinney-Vento Act defines homeless children and youth as individuals who lack a fixed, regular, and adequate nighttime residence.

McKinney-Vento Assistance Act

- The McKinney-Vento Homeless Assistance Act (McKinney-Vento Act) (42 U.S.C. §

11431-11435) is federal legislation that ensures the educational rights and protections of children and youth experiencing homelessness. It requires all local educational agencies (LEAs) to ensure that homeless students have access to the same free, appropriate public education, including public preschools, as provided to other children and youth.

McKinney-Vento Identification

- Identified through enrollment registration packet - McKinney-Vento Form
- SIS Label is a yellow asterisk
- ToR and/or Coordinator observation - Notify Intervention Coordinator; encourage family to update MKV Form

Homeless & Foster Students

ToRs must notify the Intervention Coordinator when a family makes you aware that they are residing outside of Kern, Los Angeles, San Bernardino, Riverside, Orange, or San Diego county.

Refer to our Homeless, Foster & Mobile Youth Rights & Support Process for detailed information.

Grade Retention & Acceleration Requests

Elementary Principal: April Saade, assade@excelacademy.education

The general philosophy is that because Excel Academy offers personalized learning, retention & acceleration are rarely necessary. **If a parent is requesting retention or acceleration, the ToR should reach out to the Elementary Principal.** Please also review Retention & Acceleration Policies & Processes.

Community

Shared Drive Community Folder

- Excel Academy Permission Slips
- Waiver - When Parent B Takes Student A Forms
- Authorized Chaperone and Non-Student Sibling List

Field Trips/Community Events

In order to offer quality field trips each year, we depend on our teachers to help chaperone throughout the year. As part of your contract, Personalized Path ToRs are required to fulfill service requirements toward field trips and/or community events. Virtual Path ToRs are not required to complete these duties, but may participate if they choose to do so.

Per legal counsel, children of staff who are not enrolled Excel Academy students, may not attend field trips. If your child is an Excel Academy student and you are signed up to chaperone, your child must have a designated guardian attending with them. Waivers should reflect the information of the guardian in attendance and tickets, when applicable, must be purchased for this guardian.

Chaperone Checklist

- **Outdoor Classroom Days** Reach out to the Community Liaison in charge of the park day with any questions.
- Wear your Excel Academy shirt/sweatshirt (and name tag if available).
- Bring your Excel Academy backpack and make sure you have your first aid kit.
- Bring Excel Academy signage, flag, and/or umbrella.
- Please take photos and send them to the Social Media Liaison (Michelle Moran).

Field Trips

- Wear your Excel Academy shirt/sweatshirt (and name tag if available).
- Bring your Excel Academy backpack and make sure you have your first aid kit.

- Double check your clipboard for extra copies of waivers. Copy included below and within the Community Folder of ToR Manual.
    - Waivers: student, parent, sibling
    - Waivers: parent B brings student A (highlighted in Red below)
- Arrive 15 minutes earlier than the time the coordinator of the event asks the families to arrive, so you can notify the venue to anticipate our group's arrival and greet the families when they arrive.
- Reserve 15 minutes for our families to gather before tours or activities start. Please use this time period to:
    - Take attendance and check in families
    - Collect waivers if any are missing
- If it is a larger group, one ToR could help call/text families who are late and wait for them if necessary, while the other chaperone(s) stay with the rest of the group and move on to participate in the field trip activities.
    - The roster will note any special circumstances regarding transportation. <u>If a student arrives with another family (that has not been noted or communicated to you previously by the coordinator), you must call the field trip coordinator.</u>

- Stay with the group until the field trip is over. It is our hope that the presence of Excel Academy teachers at the field trips makes the trips more intimate and allows parents to feel the support of our team, and students feel they truly belong to an incredible school.
- Some parents do not want any pictures, front or back view, of their kids to be posted. Be sure to double check with parents that it is ok to take a photo. Make sure you get the names of the students for small group photos. Please send pictures to the Social Media Liaison and the field trip coordinator of the event to be posted on Instagram and Facebook, as well as the newsletter.
- Thank the families and venue when you leave to signal that Excel Academy's field trip time has ended, and the families are there on their own if they choose to stay. Text the community coordinator of the event when you leave.
- Turn in the collected waivers (one waiver for students, another for parents and non-students, including siblings and guests) to the office the next time you are there. There is no rush.

<u>Reimbursement for Driving</u>

All teachers will receive mileage reimbursement at the IRS published reimbursement rate, this will cover driving expenses related to your job as a Teacher of Record. Teachers will keep track and submit reimbursement for their mileage for all work-related drives, including learning period meetings via Paycom mileage tracker application. Please see mileage reimbursement policy for additional details.

All reimbursements are to be submitted via Paycom and submitted within two weeks (10 business days) of the end of the month for which reimbursements are being requested.

Special Education Department

Students with IEPs

Every student within the Special Education Department (SPED) has what is called an IEP, or Individualized Education Program. An IEP is a document and a map that lays out the program of special education instruction, supports and services a student requires in order to make progress toward grade level standards.

How do I know if I have a student receiving SPED services on my roster?

In the ToR's student roster in SIS, a variety of symbols may appear next to a student's name. If a dark blue star appears, this will indicate that the student has an IEP. The ToR will reach out to the parent and explain how our school works, following the initial phone call guidelines, just like any other student assigned to them. The parent will sign the ***Master Agreement and Acknowledgement of Responsibilities***, officially enrolling them in our school. If the parent of a newly enrolled SPED student poses questions to the ToR that they are unsure of the answer to, reach out to the SPED Intake Manager, Sondra Ryan, for further support.
For newly enrolled High School students, it is vital to collaborate with LaKeyshia Ono and the High School Counselors PRIOR to developing the student's MA.

****It is imperative that you inform the SPED Director, Lara Ulmer, within 24 hours** of the *Master Agreement* being signed. **This 24 hour notification is crucial so that the Special Education team can comply with all legal timelines for newly enrolled students. IEP services cannot begin until a signed MA is received.**

Once the MA is signed, an interim offer will be sent from the SPED Department to the parent/guardian and a 30 day IEP will be scheduled to finalize the student's IEP after a period of data gathering. *ToRs are required to participate in all portions of all IEP meetings for students on their roster, including the 30 day IEP.* At the IEP all team members will be expected to speak to the students academic present levels at the time of the meeting. ToRs are the experts in general education expectations and grade level standards at all IEP meetings. This means you

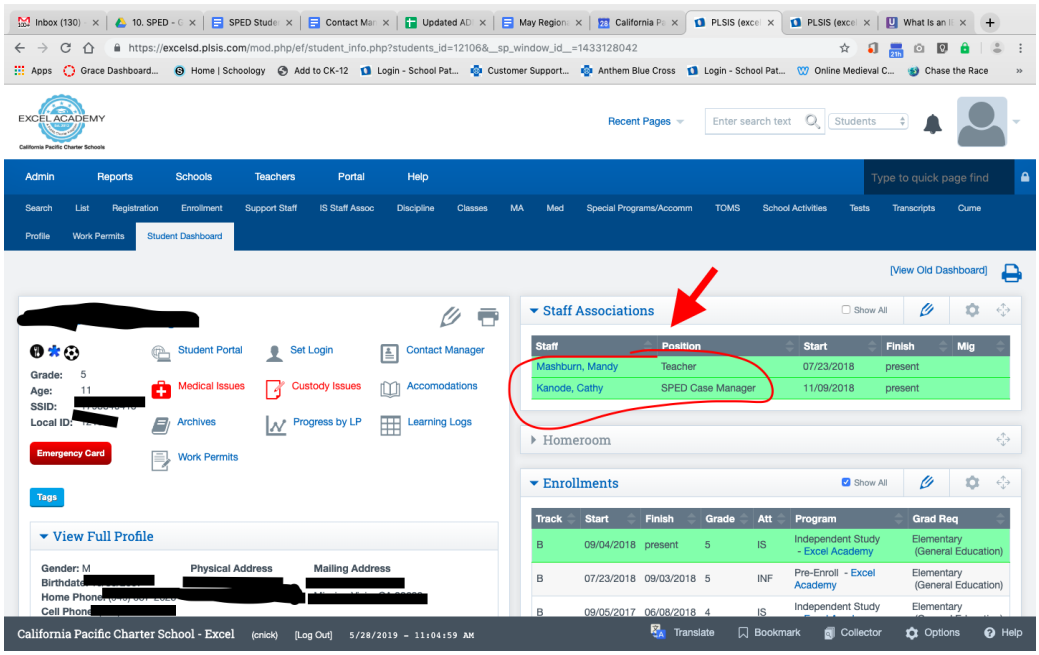
will need to spend extra time getting to know the educational needs/strengths of any new students with IEPs assigned to your roster.

Any questions about a continuing student's IEP should be directed to the assigned Case Manager. The SPED Department Coordinator will be the temporary CM for all newly enrolled students until the 30 day IEP is complete and a permanent CM is assigned.

You can find your student's **Case Manager** within SIS/Pathways.

Find the Case Manager for Your Student:

- Click on the student name on your roster, which will take you to the student dashboard (see below).
- The circled names indicate the assigned teacher (yourself) and the case manager for the student.



Students with IEPs will be treated just like any other General Education student, ***except for any areas relating to their disability.***

For instance, if a student with an IEP does not attend/reschedule an LP meeting, they should receive a PIN. Please note that ToRs are NOT required to request permission from the student's CM or any other special education team member prior to issuing a PIN according to the policies and guidelines set by Excel Academy.

Please include the student's assigned case manager and SPED Program Specialist (Leah Vides) **once a student reaches their third** PIN so that the team can guide you through required

next steps and collaborate on strategies to best support the student. An IEP meeting is required specifically to discuss PIN concerns, per the EACS SPED PIN Policy.

Following issuance of the 3rd PIN, please continue to issue PINs to all students if necessary, and continue to notify the CM and Program Specialist as they accumulate.

*If you are ever in doubt about a student's needs, please reach out to their assigned case manager for more information.

Roles/responsibilities throughout the school year

Open communication with families during the year will assist in meaningful and fruitful IEP meetings. Prior to the first day of school, *the Case Managers will provide you with an "IEP at-a-glance" document for each student at the beginning of the school year and each time the IEP is updated throughout the year*. This document will provide you with a summary of the student's required disability accommodations, goals that are being addressed through the IEP, and the services currently being provided to address the goals. If you have any questions regarding the document or its contents, reach out to the CM.

Throughout the school year you will complete all your regularly assigned ToR duties for all students on your roster, including those with IEPs. However, for students with an IEP, you will have additional responsibilities.

For all students with IEPs on your roster:

- Read, review and be aware of changes to the student's IEP throughout the school year.
- Become familiar with each student's goal areas, service areas, accommodations and modifications. Accommodations and modifications are required to be implemented throughout all general education activities.
- The IEP is a legally-binding document that is active and in place ***every minute of every school day.*** Knowing and understanding it will support student progress and success!
- Communication, communication, communication! Regular communication throughout the year is crucial to a meaningful IEP process.
- Assist parents with the implementation of accommodations listed in the IEP (related to instruction and strategies.) Please consult with the assigned Case Manager as needed.
- If you believe you require the assistance of the CM either in preparation for or duringa LP meeting, please reach out to them well in advance. Once you have shared your concerns they will determine whether it is appropriate for them to accompany you to the LP meeting, or if a formal IEP meeting should be scheduled to address the concern with the entire team present. e.
- Collaborate with students' assigned Case Manager prior to report card completion for support with appropriate comment selection.

- Share all concerns related to special education with the student's assigned Case Manager immediately. The special education department is responsible for addressing many parent concerns in a formal manner via IEP discussion. If a parent is expressing concerns or directing requests regarding their student's special education services to you; it is your responsibility to direct the parent to their CM.
  ***If you reach out to a CM to share a concern or request on behalf of a parent, and do not receive a response within 48 hours, please reach out to Leah Vides, Program Specialist, for further assistance.*

For some students on your roster:

- In conjunction with the assigned Case Manager or Special Education Coordinator, assist parents with implementation of modifications listed in the IEP
- Provide consultation or collaboration services as listed in the IEP

Roles/responsibilities in preparation for the IEP meeting

The Special Education Case Manager is responsible for scheduling the IEP meetings and will communicate options for dates and times with all members of the IEP team. Regularly anticipated IEP meetings will be scheduled at least one month prior to the meeting.

Note: Case managers will do their best ***not to*** schedule regular Plan Review and Eligibility Evaluations during LP meeting weeks. However, due to legal timelines or urgent circumstances, this cannot always be avoided.

General Education Feedback Form: This form will be located within the Shared Drive. In preparation for the IEP meeting you will need to complete it in its entirety.

- ***Please fill out every section of this form with current information that pertains to your student. You will need to add as much information as possible (1 or 2 sentences does not suffice) including most recent iReady and Statewide test scores if available.***
- Please remember you are the link to the parent who is doing the primary teaching and using the curriculum and the IEP. If you do not have the information to complete a particular section of the form, please reach out to the Case Manager for guidance. Gathering parent-reported information may be appropriate for some areas, however as the ToR you are expected to have a full understanding of the student's academic levels.
- Always indicate if the information was gathered via assessment, observation, work samples, parent report etc.

Role DURING the IEP meetings

As the ToR, you are the student's general education teacher of record and a legally required member of the IEP team. You are vital to the educational progress of students with IEPs and considered the general education expert for that student.

The general education teacher is expected to contribute to the IEP team process by obtaining and/or contributing to the team in the areas of:

- General Education curriculum and content.
- A student's performance and engagement within the Independent Study environment.
- A student's interactions with both their peers and parent/guardian.
- The pace at which a student's curriculum is being completed with mastery. Also, *how much reteaching is needed to maintain that mastery*.
- Relating general education assessment results, both formal and informal.
- A student's use of accommodations/modifications in their daily work.

The Case Managers will develop an agenda for each meeting so you know the sequence of topics, and when you will have the opportunity to speak. Throughout the meeting, the facilitator will ask if there are any questions and if certain team members are in agreement with the information being shared or recommendations being made. Please speak up and ask/answer questions throughout the meeting. The IEP requires input and consensus from all members of the team, and your voice is important! However, it is vital to remember that in all IEP meetings, the focus of all discussions and outcomes should be driven by student needs. IEPs are not developed or modified to meet the preferences of the parent or guardian.

Roles/responsibilities AFTER the IEP meeting

After the IEP meeting you will receive the IEP via docusign for your signature on the attendance portion of the consent page.

Please sign to confirm your participation in the meeting within 24 business hours so that all IEPs can be affirmed for compliance within the allotted timelines. You will be notified once the parent has provided consent to the IEP.

- If the parent contacts you after the IEP to express concerns or pose questions prior to providing their signature of consent, please immediately notify their case manager.
- The new IEP is in effect once consent is received and the IEP cycle will begin again. If any follow-up activities are required, you will be provided with this information.

Communication Protocol

Forms of Communication Used within Excel Academy:

- **Beehively:** This is the primary form of communication between both staff and families enrolled in Excel Academy. All important school wide announcements, opportunities, field trips, community events, registration sign ups, and other opportunities are posted on this platform, and will notify parents via email or text message. It is important that every Teacher's Beehively page is set up and used regularly by Teachers. ToRs who do not use this platform do a disservice to their families, as parents often follow the lead of their Teachers, and may miss out on important announcements and opportunities by ignoring communications sent by the school via Beehively to families.

- **Email:** Email is the primary mode of communication between staff members, and for one on one communications between a Teacher and a Parent/Student. It is important that if a question can be answered in an email, the sender uses this option. There are two reasons for this:
  - Emails are a perfect way to document a conversation took place and to relocate the information if needed in the future
  - Everyone is extremely busy and cannot take the time to answer the phone when an email is sufficient
- **Phone:** The phone should be used if the situation or question would be hard to easily describe in an email. (example: a situation with a family is so long and convoluted that it would require multiple emails back and forth.) It should also be used in the event of an emergency situation. Of course, if someone needs medical attention, dial 911 first, but then contact an administrator to apprise them of the situation.
- **In-Person/Face-to-Face:** This form of communication is rare and will only occur during our Professional Development and Regional Meetings as well as some performance reviews or other critical meetings.

Any correspondence with a student ***must* include the parent/guardian. At no time should a ToR communicate solely with a student, unless you receive written permission from the parent/guardian.

Please Note: If sensitive information comes up in an email thread or you decide to call the individual(s) instead of continuing the thread, establish that a new form of communication will be taking place by writing something to the effect of: "I will give you a call to finish this

discussion." That way, if you need to look back on the topic, you know that the conversation didn't fall through the cracks.

Please Follow the Guidelines Below:

Sender

- ***Only include those who need to know or respond to the communication***. Think through before sending. Refer to each department's Who Does What sheet if you are unsure of who to email.

- **Always "BCC" emails with large groups of people**.
  - **"bcc"** allows receivers to "reply" back to the sender *without including anyone else in the reply*. This cuts down on unnecessary replies of "thank you" to everyone.
  - **"bcc"** allows for the *privacy of other receivers of the email*. **Always use "bcc" when parent email addresses are involved. This will not allow anyone to see the email addresses.**
  - **"cc"** is used *when you do not need to hide the privacy of someone that is needed on the email*.
    - **Ex.** Email to Lorrie that you would like to also be seen by Salmeh in admissions, but the primary email is to Lorrie.

- **Title:** The title should **reflect what you are communicating in the email**. Start a new email, rather than bring up a topic not related to the email string. *Do not attach an important conversation to the bottom of an email chain that has nothing to do with the topic. Do not start a new email chain about a topic already being discussed.*
  - **Ex:** A chain about a student not completing iReady:
    - Incorrect: "iReady"
    - Correct: "J. Smith Did Not Complete iReady"
    - Incorrect: "Idea"
    - Correct: "Idea for End of the Year Luncheon"

  - **Ex:** The email chain above turns into a conversation about concern over J. Smith's grades
    - Correct: Start a new email with the title **"Question about Student Grades"** with the appropriate people attached
    - Incorrect: Continue the conversation with people that do not need to be on it in a chain that has a title that does not fit the topic

- **Follow-up protocol:** If you do not receive a response **within 48 business hours**, you may send a follow-up email.

- **Urgent Emails:** Emails that must be handled immediately due to time sensitivity. *After 4 hours, you may follow up the email with another email and phone call.*
  - If your request is Urgent, the title should include the word **Urgent** at the beginning, with the meaningful title following.
    - Ex. ***Urgent: Concerning Student Conduct***
  - Urgent Emails should be answered **within 4 hours** during office hours (8:30-4:30)

*****What emails should be considered urgent?***

SPED Testing Request, time sensitive SPED situations, Reports of Self-Harm, Emotional Distress, Abuse, Emergencies, etc.

*****What emails should NOT be considered urgent?***

Work permits, concurrent enrollment forms, enrollment or withdrawal of a student, general IEP questions, attendance questions (unless you are Cori or Keri), etc. All aforementioned items have a process in place to review such requests.

- **DNR:** (Do Not Reply) Emails that are Informational Only and Do Not need a response:
  - Title the email with DNR and then the title
    - Example: ***DNR: Finished Editing the Safety Plan***

- **PR**: (Please Reply)
  - Emails in which you need a simple confirmation from the receiver of "Got It" or "Okay" in order to know they reviewed it and understand the contents
    - Ex. ***PR: New Guidelines Attached***

- **AR:** (Action Required)
  - Emails that require an action to be taken [i.e. surveys, student request, inputting payroll numbers, etc.
    - Ex. ***AR: Roster Requests for 2019/20 School Year***

Receiver

- Do NOT respond to emails with DNR
- Do reply to PR emails with a "Received" or other acknowledgment of receipt
- Complete the action of AR emails within a timely manner
- If a sender accidentally sends an all staff email via CC rather than BCC, do NOT "reply all" to it. This adds unnecessary emails to everyone on the email.
- Reply to all emails within 24 hours and all urgent emails within 4 hours

Things to Avoid:

- Do not use ALL CAPS, as it can be construed as anger or yelling.
- Always read through and soften up anything that could be taken in the wrong way.

Staff Resources

Policy Organizer
Comprehensive Safety Plan
Frequently Used Excel Websites for Families
Staff Directory
IT Request Form

Personalized Path Teacher of Record

Training Manual

2023-2024 School Year

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Highlights of Policy or Procedure Changes for 2023/24

Admissions

- **TK enrollment:** The deadline for TK entry has been extended. Students turning 5 years old between September 2- April 2nd may begin TK with Excel at the beginning of the school year. This has changed from December 2nd being the cutoff.
- **Content & Community Providers Acknowledgement Form**: This year, parents will be able to sign this document electronically in their RegOnline! New families completed it during their application process, and returning parents can log back into their RegOnline account to re-sign it for each of their students.

Community

- Service requirements won't be tracked by hours. Rather, Personalized ToRs may choose one of the following options (see table below) to fulfill their yearly requirements. Throughout the school year each ToR will document what they have completed in each column and change the pink cell to green. By the end of the school year, each column that is highlighted in pink should appear in green.

Option 1			
Regional Event	**Field Trips**	**Outdoor Classroom**	**Virtual Lessons**
Option 2			
Regional Event	**Field Trips**	**Outdoor Classroom**	**Virtual Lessons**

Option 3			
Regional Event	**Field Trips**	**Outdoor Classroom**	**Virtual Lessons**

SPED

- When onboarding a new student with an IEP, email both LaKeyshia Ono (lono@excelacademy.education) and Lara Ulmer (lulmer@excelacademy.education) as soon as the MA is signed. There are several time sensitive requirements related to bringing on a student with an active IEP. Please use the subject line "First initial.Last Name MA - New Student" in your email and provide the student's full name, parent's full name, and parent contact information within the body of the email. The special education team will follow-up with required next steps.

Secondary

- ToRs will meet with each family twice in person, once in the fall and once in the spring. If the family prefers the LP meetings to be held virtually, then these in-person meetings may be met via a field trip or other school event.
- WIN will continue for 7th-8th grade but will not run through high school.

Department Highlights

Business Services

NEW! **How to place a Rainbow Resource Punchout Order**

Intervention

WHO to contact for what:

WIN Program	Sarah Horikawa	**WIN & ELD Classes**	Tamara Murphy
WIN Compliance	Sarah Horikawa	**Homeless/Foster Youth**	Tamara Murphy
SST Meetings TK-6	Tamara Murphy	**ELD Program**	Tamara Murphy

SST Meetings 7-12	Alison DeSchaine	**Cultural Awareness**	Tamara Murphy
504 Meetings TK-6	April Saade	**SPED Referrals**	Noell Scott & Tamara Murphy
504 Meetings 7-12	School Counselors	**Acceleration/Retention**	April Saade

WIN Program

- **WIN Program serves 1st-8th grade students (no longer HS)**
- **WIN List: ToRs will no longer enter data directly on the WIN List**. ToRs will fill out a Google Form to report assessment data 2-3 times per year
- **Early Reading (ToR given) assessments:** ToRs will begin with the oral fluency assessment. The remaining assessments will only be given, if the student scores below 50th%.

Homeless & Foster Students

- Students must reside in one of our authorized counties in order to remain enrolled.

Staff Protocol for Crisis Response

Suicide, Self-Harm, Emotional Distress or Mental Health Concerns

When a student is identified by a staff member as potentially suicidal, inducing self-harm, experiencing emotional distress, or having mental health concerns, they will follow the protocol provided for each scenario listed below. Additional information can be found in our Suicide Prevention Policy

Alarming Concerns of Any Kind

Crisis Team should be notified immediately of any student involved in a crisis or tragedy of any kind, including but not limited to:

- potential child abuse/neglect
- drug use or overdose
- hospitalization of any kind (psychiatric, eating disorders, other medical, etc)

- death of a family member
- hostage situations
- car accidents resulting in serious injury
- run away from home
- student/parent arrest
- police activity

Crisis Team:

The Crisis Team will support, guide, and intervene on behalf of students, families, and staff during or after crisis situations. Due to the virtual nature of EACS, the Crisis Team relies on staff to swiftly inform them of concerning situations.

Monday-Friday 8:00-5:00: Contact **CORE Crisis Team**

Outside of School Hours: Contact Keri Schneeweiss or Heidi Gasca

CORE Crisis Team:

Larissa Allen-Jefferson, *School Counselor: lallenjefferson@excelacademy.education*
Daniel Favela, *School Counselor: dfavela@excelacademy.education*
April Saade, *Elementary Principal:* (949) 774-6231 asaade@excelacademy.education
Lisa Durham, *School Counselor:* (949) 774-5799 ldurham@excelacademy.education

Supporting Members:

** These staff members will be contacted by the Core Crisis Team as deemed necessary**
Rebecca Metoyer, *School Psychologist:* (714) 367-6749, rmetoyer@excelacademy.education
Noell Scott, *School Psychologist:* (949) 382-1198, nscott@excelacademy.education
Keri Schneeweiss, *Director of Educational Services*: (949) 742-2399, kschneeweiss@excelacademy.education
Heidi Gasca, *Executive Director*: (949) 412-3122, hgasca@excelacademy.education

Staff Contacted when Student is in Immediate Crisis

- **Advise parents to call 911, or take them to the ER.**
- **If the student's life is in immediate danger & the parent does not seek immediate support**, ToR should call 911
- If parent refuses to access treatment for a student who has been identified to be at risk for suicide or emotional distress, the Crisis Team will meet with the parent to identify barriers to treatment and work to rectify the situation. If follow-up care is still not provided, an Excel Academy staff member may report the incident to Child Protective Services.

- LA County DCFS: (800) 540-4000
- OC County CPS: (714) 940-1000 or (800) 207-4464
- Riverside DCSS: (800)442-4918
- San Bernardino CPS: (800) 827-8724
- San Diego CPS: (858) 560-2191 or (800) 344-6000
- Ventura County CFS: (805) 654-3200 or 1-800-754-7600.
- National Child Abuse Hotline: (800) 442-4453

ToR Protocol After Crisis

If the ToR learns of an attempted suicide, harm to self/others, admittance to a treatment program, or any other alarming concern follow the protocol below:

1. **Send Core Crisis Team an email (list of emails on page 1)**
    a. State "URGENT CRISIS TEAM: (first initial). (last name)" in the subject line, notifying them of all known details of the situation.
2. **Call Core Crisis Team Members until you speak with someone:** School Counselors, Elementary Principal
3. The Crisis Team will work together to support the student, family, & ToR.
4. Once the situation is stable, an SST Meeting may be held, if appropriate

Active Harm to Self/Others with Excel Staff Present

In the case Excel Staff is present when a student attempts suicide, follow the protocol below:

1. **Immediately call 911**
2. **Supervise the student to ensure their safety until help arrives**
3. **If possible, assign another Excel Staff Member to call Core Crisis Team Members until you speak with someone:** School Counselors, Elementary Principal
    a. If parent/guardian was not present, Crisis Team will contact the parent and assist them.
4. **Send Core Crisis Team an email (list of emails on page 1)**
    a. State "URGENT CRISIS TEAM: (first initial). (last name)" in the subject line, notifying them of all known details of the situation.
5. Crisis Team will work together to support the student, family, & ToR.

6. Once the situation is stable, an SST Meeting will be held.

Reporting All Homicidal Threats is Required by Law

The new statutes require any school district employee interacting with students in grades 7 through 12, inclusive, who observes a threat or perceived threat that a student is going to "commit a homicidal act related to school or school activity" to immediately report such threat to local law enforcement. (Ed. Code, § 49393.) Any report of a homicidal threat must include any evidence associated with the threat or perceived threat. If two or more school employees observe the same concerning conduct, a report by one of the employees is sufficient to meet the obligation of all of the employees.

A "threat or perceived threat" is defined by the law as: "any writing or action of a pupil that creates a reasonable suspicion that the pupil is preparing to commit a homicidal act related to school or a school activity." (Ed. Code, § 49390(e).) A threat or perceived threat may be based on a student's "possession, use, or depictions of firearms, ammunition, shootings, or targets in association with infliction of physical harm, destruction, or death in a social media post, journal, class note, or other media associated with the pupil." A threat or perceived threat may also be based on "a warning by a parent, pupil, or other individual."

If local law enforcement is notified of any threat or perceived threat, SB 906 requires the law enforcement agency or school site police—with LEA support—to immediately conduct an investigation and assessment of the reported threat. The investigation must include "a review of the firearm registry of the Department of Justice" and if justified by reasonable suspicion, a search of the school site. (Ed. Code, § 49394.)

SB 906 mandates each LEA provide all parents TK-12 "information related to the safe storage of firearms" in the required annual notification, which means an LEA's first disclosure would be required in the upcoming 2023-2024 school year. This is included in the Parent/Student Handbook. (Ed. Code § 49392.)

Signs of Suicide, Self-Harm, & Emotional Distress

Self-Harm Behavior that is self-directed and deliberately results in injury or the potential for injury to oneself. Can be categorized as either nonsuicidal or suicidal. Although self-harm often lacks suicidal intent, youth who engage in self-harm are more likely to attempt suicide. For example:

- Cutting
- Burning
- Head banging

Risk Factors for Suicide

- Direct statements about suicide
- Indirect statements about harming themselves
- Expressing the desire to be dead
- Suicide ideation: talking about specific plans and/or details of suicide
- Suicide contagion: student knows someone who recently died by suicide
- Family history of suicide
- Prior suicide attempt
- Self-medication with drugs or alcohol
- Promiscuous behavior
- High-risk behaviors

Warning Signs

- Suicidal ideation
- Substance abuse
- Purposelessness
- Anxiety and agitation
- Feeling trapped
- Feeling hopeless
- Withdrawal, Isolation
- Anger
- Recklessness
- Mood Fluctuations
- Significant change in behavior and/or physical appearance
- **Any other unusual or upsetting behavior**

ToR Referral Protocol for Mental Health Conditions

Mental Health Condition

A state of mental and emotional being that can impact choices and actions that affect wellness. Mental health problems include:

- Mental and substance abuse disorders
- Anxiety
- Depression
- Bipolar disorder
- Obsessive compulsive disorder
- Oppositional defiant disorder, etc

ToR Protocol

1. **Send Core Crisis Team an email**
    a. State "IMPORTANT: (first initial). (last name)" in the subject line, notifying them of the condition.
2. School Counselor will reach out to the family to ensure the student is receiving proper support
3. If they need more support, an SST Meeting will be held with the ToR & Crisis Team

Crisis Services and Resources for Students:

Click here for a link to Mental Health Referrals by County

Care Solace

EACS provides *Care Solace* service for students, staff, and their families. *Care Solace* is a mental health care coordination service that connects people to mental health care covered by their insurance or on a sliding scale. *Care Solace* connects clients to *more* than counseling. They also connect people to substance use treatment centers (rehab), inpatient/residential programs, outpatient programs, psychological evaluations, and intervention services.
https://caresolace.com/site/excelacademy

CalHOPE Warm Line:

The CalHOPE warm line connects callers to other people who have persevered through struggles with stress, anxiety, depression—emotions triggered by circumstances and events in everyday life. The peer counselors listen with compassion, provide non-judgmental support and guide you to additional resources that can give hope and help them cope.

Call: (833) 317-HOPE (4673)

Live Chat
https://www.calhope.org/

National Suicide Prevention Lifeline: The lifeline is a 24-hour, toll-free suicide prevention service available to anyone in suicidal crisis or their friends and loved ones. Call or text 9-8-8. Callers are routed to the closest possible crisis center in their area.
https://988lifeline.org/

Suicide online Chat format (similar to texting): Lifeline Chat is a service of the National Suicide Prevention Lifeline, connecting individuals with counselors for emotional support and other services via web chat. All chat centers in the Lifeline network are accredited by CONTACT USA. Lifeline Chat is available 24/7 across the U.S

https://suicidepreventionlifeline.org/chat/

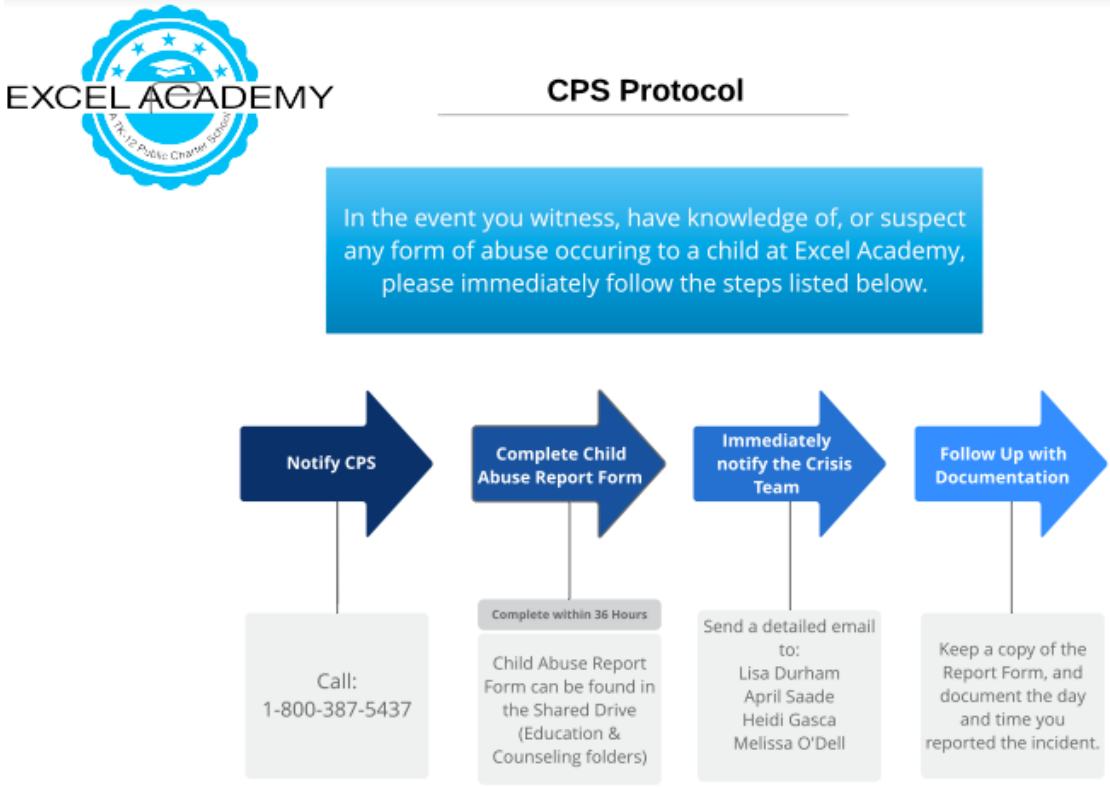
The Trevor Lifeline: The only nationwide, around-the-clock crisis intervention and suicide prevention lifeline for lesbian, gay, bisexual, transgender, and questioning young people, 13-24, available at 1-866-488-7386.

TrevorChat: A free, confidential, secure instant messaging service that provides live help to lesbian, gay, bisexual, transgender, and questioning young people, 13-24 years old, access through your computer.
www.thetrevorproject.org

Crisis Text Line is a free, 24/7, confidential text message service for people in crisis. Text **HOME** to **741741** in the United States

https://www.crisistextline.org/

CPS Protocol



Mandated Reporter Form

Child Protective Services

- LA County DCFS: (800) 540-4000

- OC County CPS: (714) 940-1000 or (800) 207-4464
- Riverside DCSS: (800)442-4918
- San Bernardino CPS: (800) 827-8724
- San Diego CPS: (858) 560-2191 or (800) 344-6000
- Ventura County CFS: (805) 654-3200 or 1-800-754-7600.
- National Child Abuse Hotline: (800) 442-4453

Instructional Funds, Materials, and Content & Community Providers

Instructional Funds Information and Guidelines

Each California state student generates funds by his/her average daily attendance (ADA). The funds are budgeted for use as outlined in the school's Local Accountability Plan (LCAP). Guidelines are as follows:

- Excel Academy may not provide any funds or other things of value to the pupil, or his or her parent or guardian, that a school district could not legally provide to a similarly situated pupil of the school district, or to his or her parents or guardian.
- Excel Academy may only receive funding for the provision of independent study to pupils who are residents of the counties the school serves.
- The Instructional Funds (IF) are appropriated for education purposes to deliver the student's educational plan. The funding may only be spent on appropriate educational materials for the enrolled student. They may not be used to provide educational materials/admissions for siblings or parents or anyone else not enrolled in Excel Academy, or for materials not applicable to the enrolled student's educational plan.
- IFs may be used on educational materials or services that are approved by the Teacher of Record (ToR).
- These funds can NOT be used for items designated in the Policy for Criteria of Materials or activities/product/instructors disallowed in the Conflict of Interest Policy. They also cannot be spent on any item or activity that requires payment for transportation. Excel Academy does not pay for transportation, as we receive no transportation funding. For

our students, core learning occurs remotely and anything the parent/guardian/student chooses to do outside of their home needs to be within the realm of what transportation they can and want to arrange/provide.

- The amount of funding is based on the ADA calendar the state uses to appropriate school funds. The IF amount is prorated and differs depending on the student's enrollment date.
- Students who are enrolled on the first day of the school year will have the maximum amount of appropriated funds when planning their educational program. Students who enroll later in the year will have less than the maximum amount of appropriated funds with which to plan.
- For the 23/24 school year, the maximum IF appropriation for each student on the personalized path is $2,900 for TK-8, and $3,400 for Grades 9-12; and 1-8 virtual path students is $1,600, for those students who are enrolled for the entire 175 school days. The IF's are placed into the fund account in multiple disbursements throughout the school year. No school funding is provided directly to parents or students for any purpose.
- All families must have the **Content & Community Provider Agreement** on file with their TOR before being allowed to request purchase orders
- Excel Academy reserves the right to determine what services and materials will best promote the student's academic achievement. IF spending ought to be considered as being ultimately at the school's discretion.
- April 12, 2024 is the deadline for orders to be submitted and approved in OPS. It is vitally important to place orders earlier than the deadline. After the deadline, no purchase orders can be submitted. IFs do not roll over from year to year. If the IFs are not used by the deadline the parent will no longer have access to them.
- IFs should be spent evenly throughout the year. All orders containing excessive quantities of anything will be reviewed by the Business Services Purchasing Coordinator, Business Services Manager, or administration. It is imperative that the parent and ToR ensure that students receive services and materials throughout the year.
- Students must reasonably be able to use all items by the last day of school. If the Business Services Department (also called Student Services) does not believe all items can be used in time, items will be reviewed and non-essential items may be canceled from the order.

Management of Instructional Funds

The parent/guardian and the ToR will work in cooperation to evaluate the most effective use of funds to produce the best possible outcomes in terms of student learning. It is the ToR's responsibility to help each family manage their IF account within the guidelines set forth. Please be mindful that while these funds are allotted to each student, the funds remain part of the Excel Academy's budget and the items purchased with these funds remain Excel Academy's property. It is the ToR's responsibility to make sure that each family does not spend in excess of their allotted IFs. Parents can obtain information on their IF balance at any time by contacting their ToR or logging into their access point in OPS. Parents are encouraged to assist in determining the allocation of these funds, however, the ultimate responsibility for ethical and professional distribution of these funds is the ToR's. This responsibility is not shared and the ToR is responsible to ensure that all core curriculum has been put in place prior to requesting purchase orders for extracurricular activities. The administration will mediate any disagreements between parents/guardians and ToRs regarding IF purchases.

Criteria for Materials That Can Be Purchased with Instructional Funds

Excel Academy receives funding from the state to support student learning and progress toward the state's standards. Therefore, IFs need to be spent on educational items that meet the criteria below. ToRs will consult with the Business Services Purchasing coordinator for additional clarification on acceptable IF purchases. The list below should not be considered as all-inclusive and Excel Academy reserves the right to the interpretation of the below criteria and to exercise final judgment on how IFs will be used.

Here are some examples of things that can be purchased with IFs:

- CORE educational classes
- CORE materials and curriculum
- CORE tutoring
- Elective educational classes
- Elective educational materials/supplies
- School supplies
- School sponsored field trips
- Music lessons
- Physical education classes

General Criteria:

- Educational curriculum ordered is appropriate for the student's courses and learning plan.
- Materials must be used to meet state and school standards for the student for whom the materials are being purchased.
- All materials must be non-sectarian and non-denominational.
- As a general rule, **basic, economical items/models must be selected**. If the student requires a higher-priced, less than basic item/model, a statement from the ToR justifying the purchase may be required.
- School & office supplies adequate for learning basic course skills (paper, pencils, etc).
- Materials for a documented educational project: fabric, wool, yarn enough for one project (exception: no food purchases allowed.) **ToRs are responsible for monitoring the quantities of items purchased.**
- Educational software to instruct and enhance learning in a subject area.
- Materials must not expose the ToR or student to danger or serious injury.
- Tracking forms & educational plans are required for certain items.
- School sponsored field trips.
- No more than 2 black printer ink cartridges and 1 color ink cartridge per semester - Printer must be an Excel purchased printer.
- 1 Toner Cartridge per semester.
- Only 2 reams of paper are allowed per semester per student.
- Organizational items if only intended to be used by the student explicitly for the organization of school supplies.
- Instruments are to be rented out by an approved vendor. If a rental instrument is not in stock, proof needs to be submitted to Business Services that it is not in stock first, in order to purchase an approved instrument. Instruments need to be Purchased no later than January 30th.

Disallowed Items: (Please see complete list here)

If a ToR inadvertently orders materials from this list, the ToR will collect the materials and return them to school administration.

Disallowed Items by Category:	Household Furniture	Technology	Personal Items	Kitchen	P.E. Equipment	Art	Outdoors	Music	Dangerous Items
	Furniture	Computer Parts	Toys or items with no educational value	Popcorn Popper	Skis	Epoxy/Resin	Grass Watering Kits	Tuner	Knives
	Storage	Accessories & Software(1)	Personal Hygiene	Trays	Bicycles	Cricuts & Accessories	Garden Ponds	Instrument Stools	Poisons
	Storage containers	Phones	Costumes	Plates	Tricycles	Vinyl	Swimming Pools	Drums	Darts
	Picture Frames	Dictation Equipment	Uniforms	Silverware	Scooters	Heat Transfer Paper	Watering Cans	Electric Guitars	Sharp Items
	Footrest	TV's	Clothes	Food Coloring	Yoga Mats	Wax	Sharp Gardening Kits/Tool Set	Amplifier	Bow & arrows
	Chairs	3D Printers & Filament Refills	Makeup	Basic Kitchen Items	Weights	Wax Stamp Kits	Already grown plants	Cello	Weapons
	Lapdesks	Ink (2)	Jewelry	Kitchen Scale	Gloves	Hot Glue Guns	insect lore (1 per semester)	Harp	Welding Equipment
	Iron	Coding Robots over $80+	Backpacks	Disposable Gloves	Mitts	Pottery wheels	Bubbles/Bubble Machines	Piano	Explosives
	Bookshelves	VR Goggles	Power Tools	Chef Hats/Hair Nets	Bats	Large Easels		Keyboard over $75	Weedkiller
	Washer/Dryer		Wrapping Paper	Aprons	Rackets	Dried Flowers			Insect Repellant
			Gift Bags		Helmets				Fertilizer
			Soap Making Kits		Golf Clubs				
			Candles		Paddleboards				
			Fingertip Moisturizers		Gymnastics Equipment				
			Hairspray Bottles		Hockey Equipment				
			Balloons		Pogo Sticks				
			Rolling Whiteboards (3)						
			Household Cleaning Supplies						
			Hand Sanitizers						
			Fidget Toys						
			Rubix Cubes						

- (1) Accessories (ie. Tablet covers) & Software cannot be purchased for non-Excel-owned technology
- (2) Printer ink can only be purchased for an Excel purchased printer (No personal printer ink allowed)
- (3) Whiteboards must be within 48 x 36 inches
- (4) Must be taking an ETL/VCI Music Class & Needs to be Returned at the end of School Year
- (5) Need to include an explanation for sticker purchase in the internal notes.

- (6) Please explain the reason or need to purchase knitting materials, cannot be purchased in excessive amounts

Sectarian Materials

School materials cannot have sectarian/religious content. The ToR will ensure sectarian/religious materials are not ordered with IFs

Technology Options
At Excel Academy, we value the use of technology as a powerful educational tool. Therefore, we offer our students a variety of technology options for purchase with IFs. Please be aware that, like all school materials, computers ordered with IFs are property of the school and must be returned when a student's enrollment in the school ends.

- Environmental waste fees and warranties for school owned computers must be purchased with IFs.
- All families must have the **Excel Academy Technology Lease Agreement** on file with their ToR, **PRIOR** to purchase, to ensure internet safety for students and that internet and computer policies and procedures are followed.
- All accessories and software purchased must be only used for devices issued by Excel Academy. Excel Academy does not assume any liability for accessories and software installed on or used with non-Excel Academy issued devices.
- *Please note that computers don't come with any additional software (e.g. Microsoft Word).
- A list of available technology options can be found here. All computer orders must be placed according to the options listed on the technology options.
- One computer or tablet per student.

Community Provider
An approved community provider is a provider that supplies services paid for with IFs. Approved services include but are not limited to: class fees, material costs (if approved as a materials provider), enrichment activities, community involvement activities, core subject assistance, and other educational services from our current approved vendor list. All approved community providers must provide proof of background check clearance from the Department of Justice, proof of commercial liability insurance, and complete our pre-approval process.

The list below should not be considered as all-inclusive and Excel Academy reserves the right to interpretation of the below criteria and to exercise final judgment on how IFs will be used.

****Please note that all service orders must be placed 10 days prior to the start of class to allow time for processing.****
Excel Academy does not pay for registration fees or membership fees.

Community Provider Policy
- If instructional funding is to be used for approved services, all school policies and procedures must be followed.

- Prior to a student placing an order for a community provider, who is supplying non-core for TK - 8th grade students elective activities with instructional funds, core curriculum must be in place and the ToR must confirm that the student is making adequate progress with respect to grade appropriate standards.
- The services must be approved by the ToR, the purchase order (PO) must be submitted and received by the community provider prior to the event/activity.
- Excel Academy will not, under any circumstances, reimburse parents or ToRs for a student's participation in any services.
- No sectarian or denominational instruction may be given in any course/activity paid for by the school.
- The community provider must be approved before the school will pay for any services.
- School funding may only be used for students currently enrolled in the school, during the school year.
- The school does not pay for season passes, memberships, and recital fees.
- Excel Academy cannot pay for uniforms, belts, costumes, makeup, and/or ticket costs.
- All non-core/elective VCIs over $500/mo must have a ToR note on the PO stating the student is doing well academically and has a core curriculum in place.
- Any orders placed after the first of the month for that month MUST be prorated to only pay for services provided 10 days after the order was placed and must include the service start date on the description line. Per the Content & Community Provider Agreement, Excel Academy will not pay for any services rendered prior to POs being created, including the 10 day approval time frame. For example, an order placed on 9/10/2022 must be prorated for services given on or after 9/20/2022

Field Trips

Field Trips are group activities that are organized and overseen by the Field Trip Coordinator and school representatives. Field trips are a great, fun way for students and parents to join other students while pursuing their individual learning plans.

Field Trips are school activities for which a parent can decide if their students and family would like to attend. Students' participation in a trip is paid through their IFs, and parents and siblings will pay out of pocket.

Subscriptions

Excel Academy allows students to order educational subscriptions from CCPs like, Kiwi Crate, and History Unboxed. The following guidelines apply to subscriptions purchased in the 23/24 school year.

- 12 month subscriptions must be ordered between September and December 15.
- 6 month subscriptions can be ordered between December 15 and February 28.

After February 28 all subscription orders must be for 3 months or fewer.

Gardening

Some providers offer gardening materials to students. The following restrictions apply to gardening items purchased in the 23/24 school year.

- All items must be basic in nature.
- Only enough materials for one educational project are allowed per semester.
- Educational projects must be documented through learning samples and monitored by the ToR.
- Items like seeds, bulbs,and soil are allowed but must be basic in nature.
- Gardening tools may be ordered but cannot be sharp or dangerous to the student, and must be basic in nature.
- Additional items such as composters, sprouting trays, label sticks, and small pots may be ordered, but must be basic in nature.
- No items that students will wear, such as gloves or aprons, may be ordered.
- All equipment must be deemed fit for child educational gardening use.
- No furniture is allowed.
- No already grown plants are allowed -- seeds only.
- No potentially dangerous items such as weedkiller, insect repellant, or fertilizer.

LEGO® Education

LEGO® provides educational kits that are subject to the following guidelines in the 23/24 - school year:

- All orders must be placed for kits from the LEGO® Education Website.
- All orders must have clear educational value (no minifigure kits allowed).
- Any LEGO® Education orders must be documented through learning samples monitored by the ToR, and documented on the AWR.
- Kits must be grade-level appropriate.

Cancellation Policy

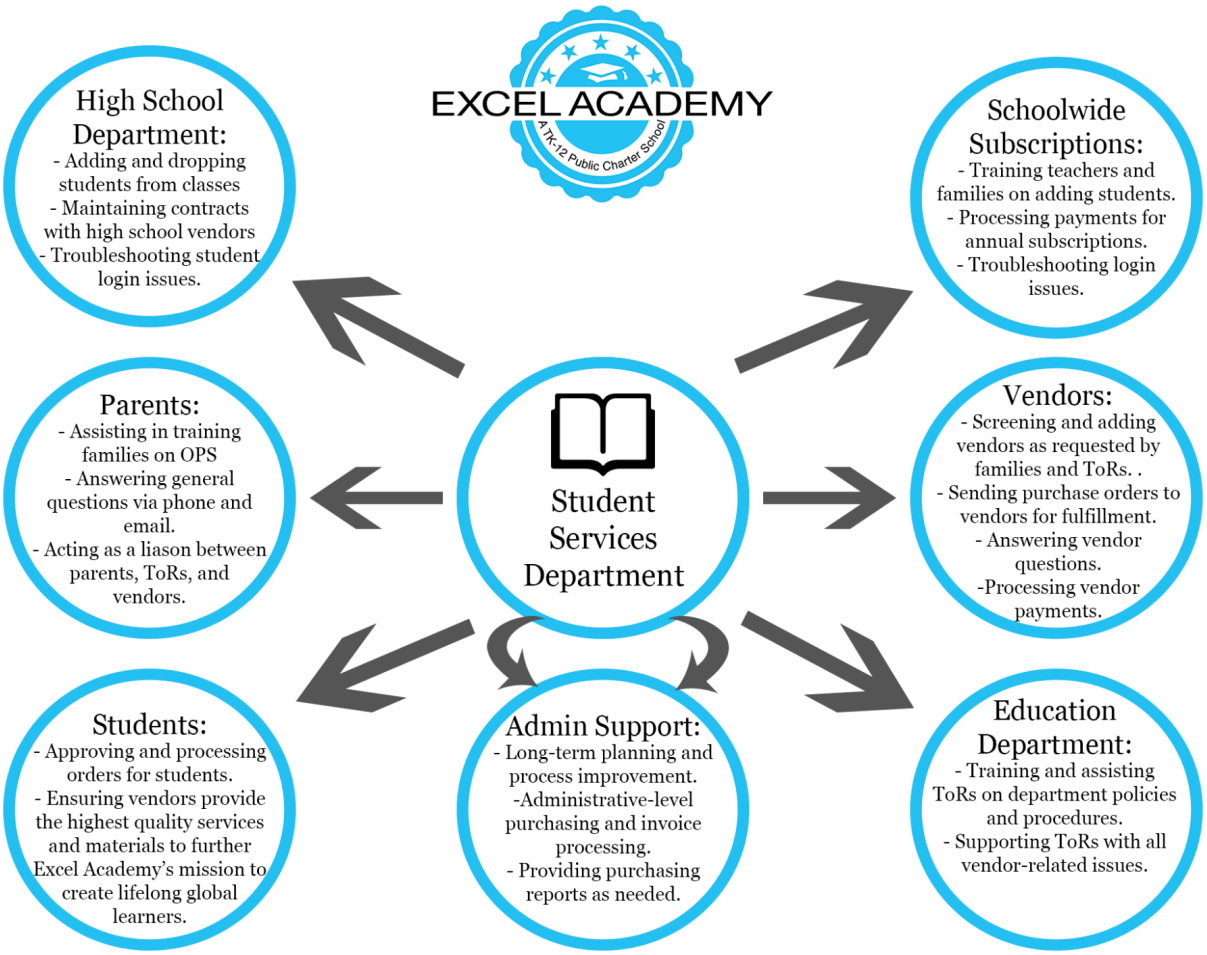
We cannot cancel an EMR order after they are processed and sent to the Content Provider. Once materials are requested, the Student Services Department will order them and they cannot be canceled. If an order has not been processed and is still in "Pre-Pending Status," the parent can cancel or edit the purchase order in OPS. For VCI orders, Community Providers **must** be notified, by the parent or guardian, of cancellation prior to orders being canceled in OPS.

Disallowed Educational Activities

The following activities are examples of disallowed activities that cannot be paid for with IFs since they impose high liability and/or political risk to the school. CCP's who provide the below services will not be approved.

- Religious, sectarian, or denominational services or materials
- Scuba Diving
- SkyDiving
- Water / Jet Skiing
- Skiing / Snowboarding
- Aircraft-related activities
- Behind the wheel driver's education
- Any motorized vehicle operation
- Extreme sports that expose the student to unnecessary risk: outdoor rock climbing, white water rafting, paragliding, etc.

ORDERING INSTRUCTIONS


EXCEL ACADEMY
A TK-12 Public Charter School
High School Department:
- Adding and dropping students from classes
- Maintaining contracts with high school vendors
- Troubleshooting student login issues.
Schoolwide Subscriptions:
- Training teachers and families on adding students.
- Processing payments for annual subscriptions.
- Troubleshooting login issues.
Parents:
- Assisting in training families on OPS
- Answering general questions via phone and email.
- Acting as a liason between parents, ToRs, and vendors.
Student Services Department
Vendors:
- Screening and adding vendors as requested by families and ToRs. .
- Sending purchase orders to vendors for fulfillment.
- Answering vendor questions.
-Processing vendor payments.
Students:
- Approving and processing orders for students.
- Ensuring vendors provide the highest quality services and materials to further Excel Academy's mission to create lifelong global learners.
Admin Support:
- Long-term planning and process improvement.
-Administrative-level purchasing and invoice processing.
- Providing purchasing reports as needed.
Education Department:
- Training and assisting ToRs on department policies and procedures.
- Supporting ToRs with all vendor-related issues.

Content & Community Provider (CCP) List Located on Website

Families can log in to their online profile to search for appropriate CCPs in their area.

If a parent is *only looking for local classes/instructors (community providers)*, we have a fantastic new app for that on our website: Map Search

Please make sure your families are aware of these search tools! They can both be found under the CCP tab on our website.

Glossary of Terms

- EMR: Educational Materials
- VCI: Educational Services
- OPS: Online Purchasing System. The system we use for ordering educational materials and services.
- Red notes: Individual guidelines for placing orders.
- Internal notes: Notes placed on orders after they have been created. Method for admin and teachers of record (ToRs) to communicate about a specific order.
- Consumable items: Items that (A) are under $30 and/or (B) cannot be reused by another student. Examples of consumable items include: workbooks, pens, paper, pencils, printer ink, etc.
- Non-consumable items: Items that (A) are over $30 and/or (B) can be reused by another student.
- Purchase order status terms:
    - **Pre-Pending:** Order has been placed by the parent and is *pending review by the ToR*.
    - **Pending:** ToR has carefully reviewed the order to ensure that the items or services being ordered correspond to Excel Academy guidelines and selected "Pending," OR the ToR has placed the order on behalf of the parent *(orders placed by ToR are assumed to have been carefully reviewed)*.
    - **Approved:** Order has been reviewed and approved by the Student Services Department.
    - **Processed:** Order has been sent to the CCP for fulfillment.
    - **Received Partial (EMR ONLY):** ToR has indicated that some, but not all, of the items on the order have been received.
    - **Received Fully (EMR ONLY):** ToR has indicated that all items on the order have been received.
    - **Invoice Matched:** Student Services Department has received the invoice from the content or community provider and matched the order in OPS to match what the charge shows on the invoice.

Content & Community Provider (CCP) Agreement

A signed copy of the Content & Community Provider Agreement must be on file before the ToR can begin placing purchase orders for services. **As of 2023/24, all new families have**

signed this document during the registration process. Returning families need to go back into their student's RegOnline account to re-sign, or you can send them the paper version. This is critically important! The ToR must go over the CCP Agreement carefully with each parent before signing. If the parent doesn't understand their role in requesting service purchase orders correctly, it will cause problems for the ToR, the Business Services Department, the community provider, and the parent. (Parent must contact a community provider to see if they are able to accommodate the student *before* placing an order. The community provider will then hold a place for the student.)

The ToR may be asked to produce a copy of the signed Content & Community Provider Agreement at any time.

ToR RESPONSIBILITY

While families are able to place orders, and the Business Services Department screens each for compliance, *it is ultimately the ToR's responsibility* to ensure that all items correspond to the Ordering Guidelines and that families adhere to the CCP Agreement. Keeping in compliance with these guidelines is critical to ensure both our students' academic success and the longevity of our school. Read the guidelines carefully, and follow all instructions listed in the red notes.

NON-CORE CURRICULUM ORDERING

Student academic achievement is of paramount importance to Excel Academy, and it is the ToR's responsibility to ensure that core curriculum is in place before allowing families to place orders for electives and other non-core materials or activities. It is the duty of the ToR to exercise their best judgment in approving all orders.

EMR ORDERS

Placing EMR Orders

To place an EMR (Educational Materials) order you must first review the order for content and appropriateness of educational material requests. Look up each item on the provider's website and confirm the item number, description, cost and availability. You must verify that items do not contain religious content as well as the cost of the item.

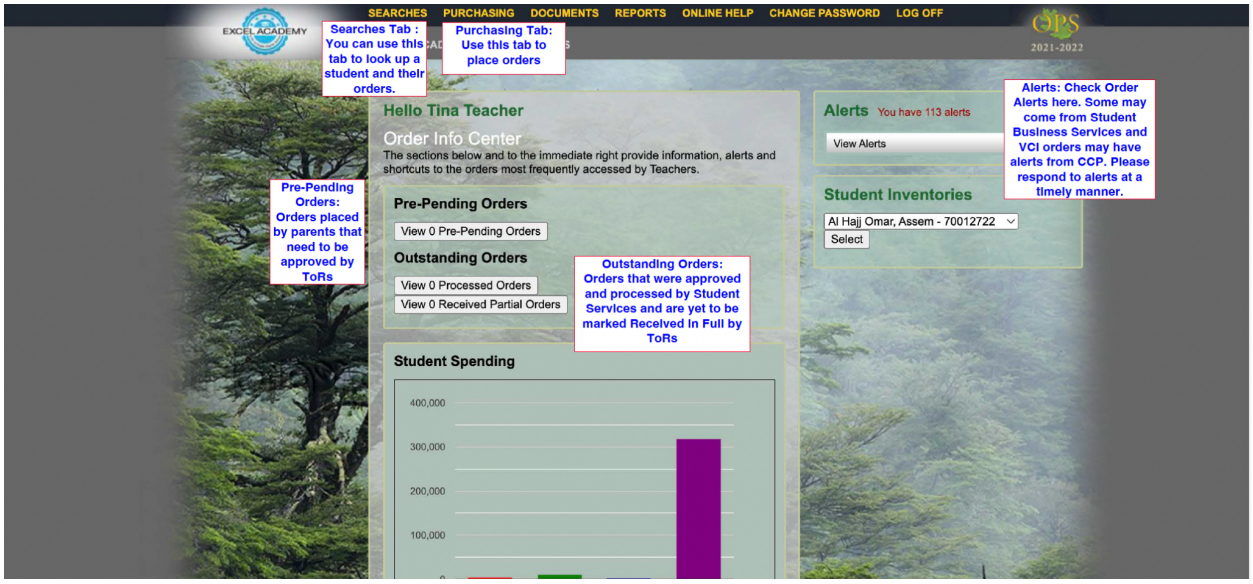
**Please note:

- 12 month subscriptions must be ordered between September and December 15.
- 6 month subscriptions can be ordered between December 15 and February 28.
- After February 28 all subscription orders must be for 3 months or fewer.

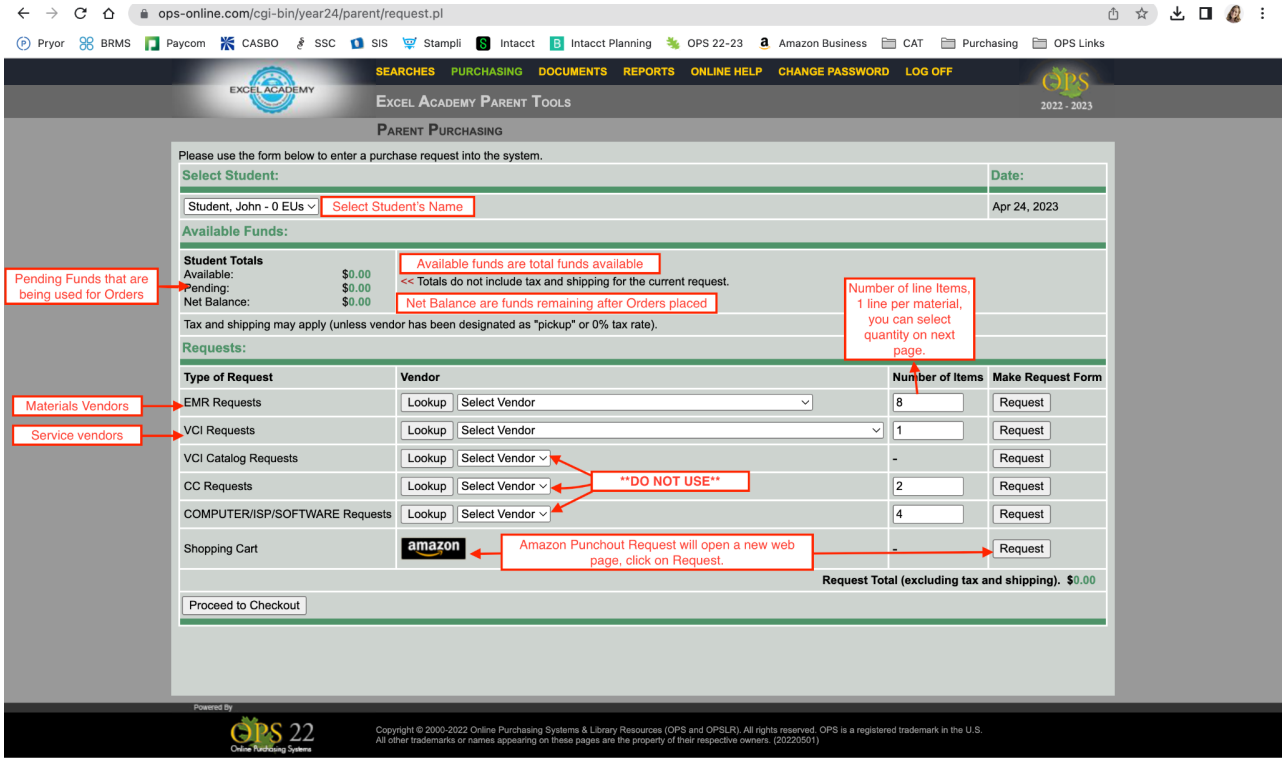
-

Training video: ToR EMR Training

1. Log in to OPS. The dashboard will show any applicable alerts and orders that need to be marked received. ***OPS uses the word vendor which we refer to as Content Provider or Community Provider***

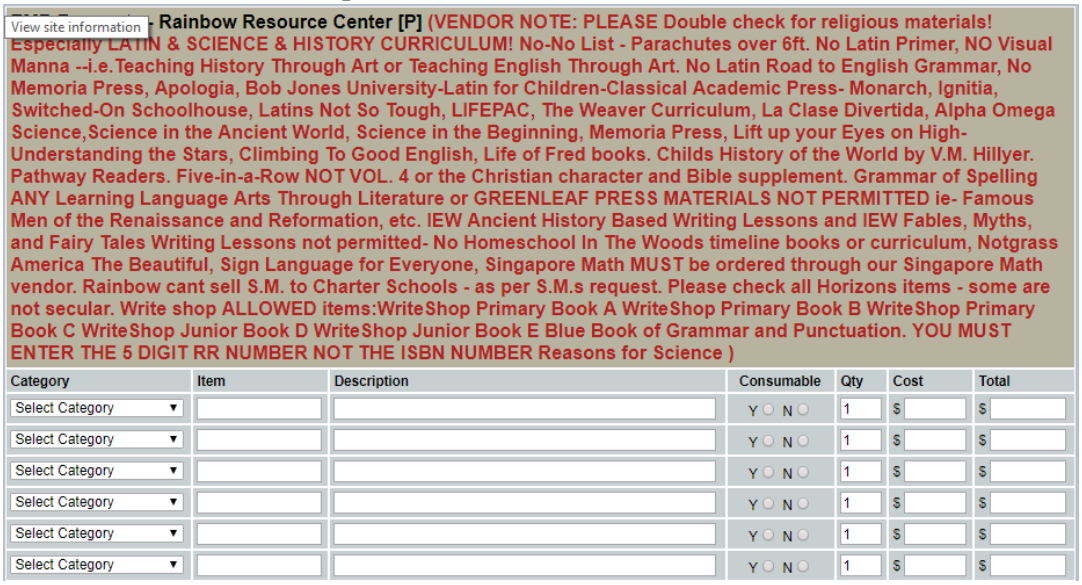


2. Click on the **"Purchasing"** tab on the top and a list of available content and community providers will be shown. Select the student from the "Select Student" drop-down list. You will see the available funds for the student there. You must be sure there are enough funds in the account to cover the order plus about 30% for shipping,handling and tax. These costs are estimates and will be adjusted when we receive the invoice.



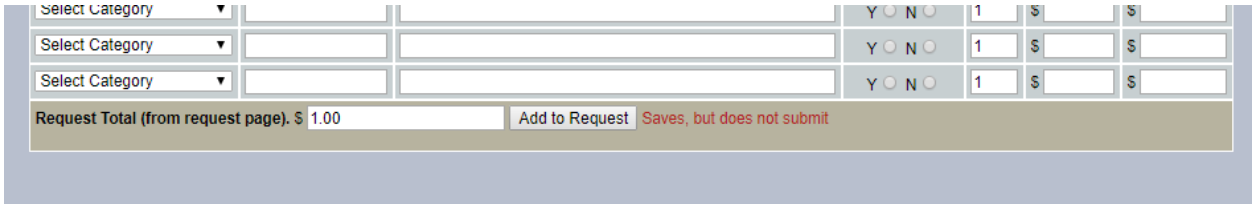
3. Select an EMR (content) provider from the first drop-down menu and indicate the number of items needed on the purchase order. Number of items in this case are item lines not quantity. You can change the quantity on the next screen. **If you forget item(s), you may add additional lines after completing instructions #1-6.** Then press "Request".

4. First, read any **red notes** on the top of the page. Not every provider has red notes. Make sure you follow the red notes for each provider that has red notes. See below:

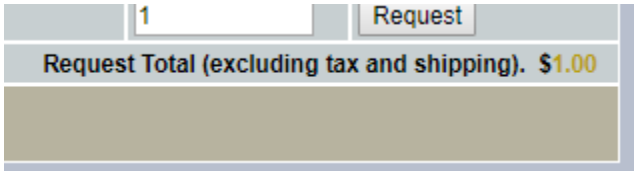


This is how the red notes for Rainbow Resource appear when attempting to place an order. Please ensure all orders follow these guidelines. Following proper ordering procedures is essential to your families receiving their items in a timely manner.

5. Next, click "**Select Category**" to access the drop down menu. Choose the most appropriate category for each item. Fill in "**Item Number**" with the item number for the product. If there is no item number available enter 0000. For **"Con."** (consumable) you must click **"Y"** or **"N"**. **All items under $30 may be marked consumable. Items that cost more than $30 that can be used by another student must be marked nonconsumable.** For **"Qty"** (quantity) enter the correct number. For **"Cost"** enter the cost for the individual item. You must verify the cost on the vendor website. OPS will calculate the total cost, but note that this is a subtotal and shipping/tax has not been factored in during this step. When complete, click on **"Add to Request"**.

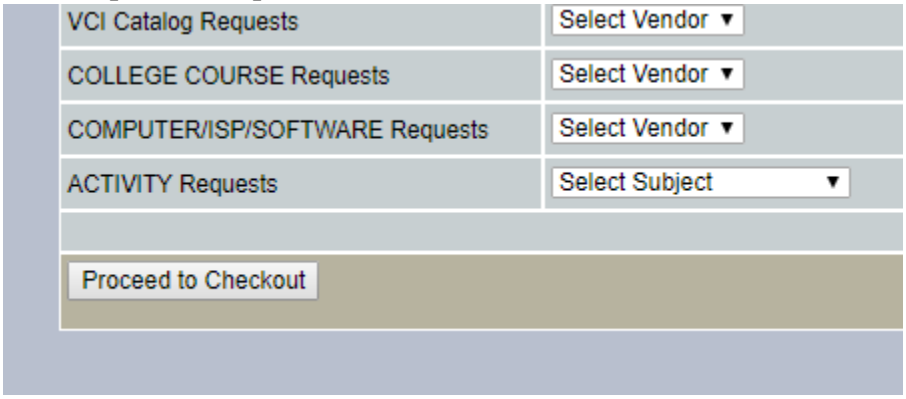


6. Pressing "Add to Request" **will not create the purchase order**. It will save that individual order. You can see the amount previously requested at the bottom of the request form once you return to that page.

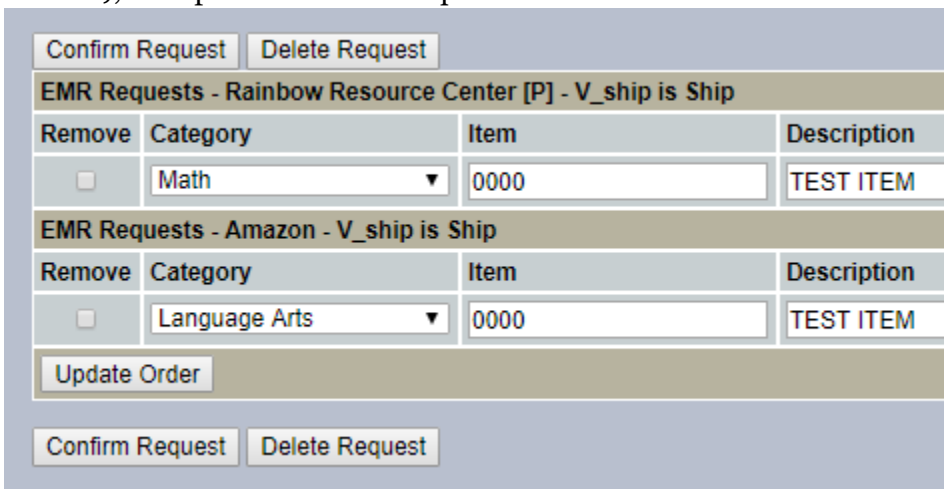


7. If you have another order that must be placed for that student you may follow steps 3-6. Additional items/lines can also be added to an order that is still in the Request 'cart' by repeating steps #3-6. Avoid combining VCI and EMR orders into the same 'checkout' as the EMR orders will appear on the VCI OA.

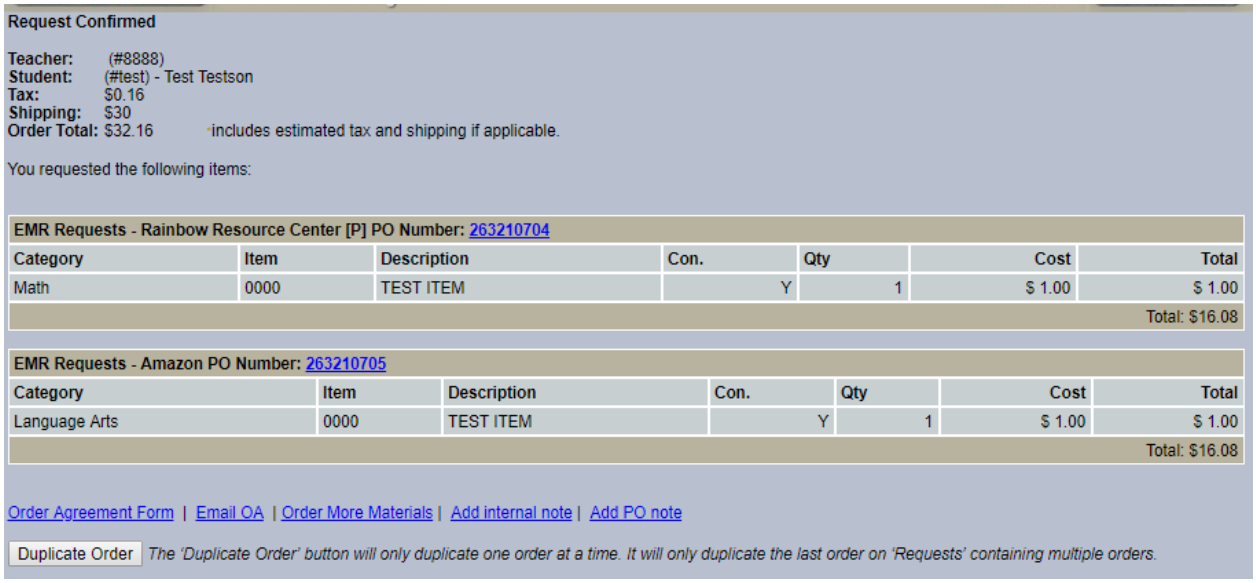
8. Once you have completed this process, click "Proceed to Checkout."



8. On the checkout screen, you will see a summary of the individual orders you have placed. Review your orders to make any last-minute corrections (you **must** press "Update Order" for the changes to be saved), then press "Confirm Request."



9. You will then be presented with the confirmation screen, where you can click on the purchase order numbers to see the PO details.



Request Confirmed

Teacher: (#8888)
Student: (#test) - Test Testson
Tax: $0.16
Shipping: $30
Order Total: $32.16 includes estimated tax and shipping if applicable.

You requested the following items:

EMR Requests - Rainbow Resource Center [P] PO Number: 263210704

Category	Item	Description	Con.	Qty	Cost	Total
Math	0000	TEST ITEM	Y	1	$ 1.00	$ 1.00
						Total: $16.08

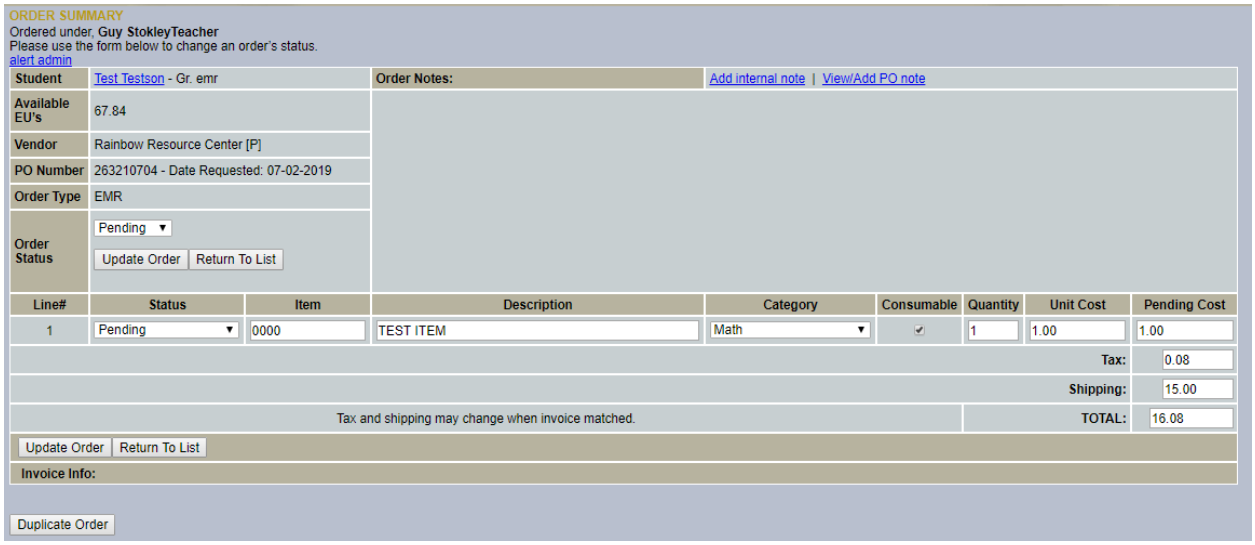
EMR Requests - Amazon PO Number: 263210705

Category	Item	Description	Con.	Qty	Cost	Total
Language Arts	0000	TEST ITEM	Y	1	$ 1.00	$ 1.00
						Total: $16.08

Order Agreement Form | Email OA | Order More Materials | Add internal note | Add PO note

Duplicate Order *The 'Duplicate Order' button will only duplicate one order at a time. It will only duplicate the last order on 'Requests' containing multiple orders.*

PO details:



ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin

Student	Test Testson - Gr. emr	**Order Notes:**	Add internal note | View/Add PO note
Available EU's	67.84		
Vendor	Rainbow Resource Center [P]		
PO Number	263210704 - Date Requested: 07-02-2019		
Order Type	EMR		
Order Status	Pending ▾ Update Order Return To List		

Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pending ▾	0000	TEST ITEM	Math ▾	☑	1	1.00	1.00
							Tax:	0.08
							Shipping:	15.00
			Tax and shipping may change when invoice matched.				**TOTAL:**	16.08

Update Order | Return To List

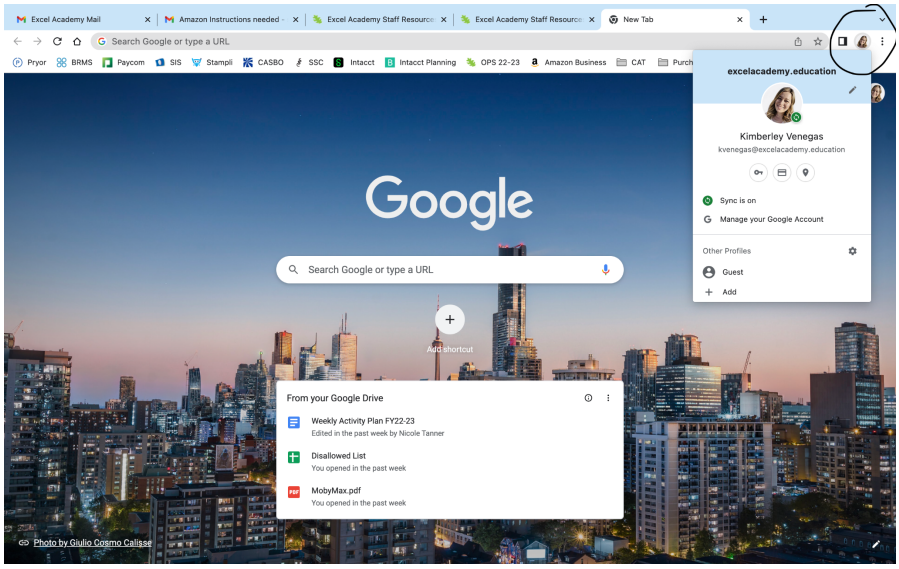
Invoice Info:

Duplicate Order

10. On this screen you may edit any changeable fields while the order is in the "Pending" stage. If you have a question for Admin, you may send a note to the Business Services Department by clicking to add an internal note. An example would be if you want items shipped directly to you, the ToR first - you would add a note to ship to you ~ Otherwise the order will ship directly to the family.

How to place an Amazon Punchout Order

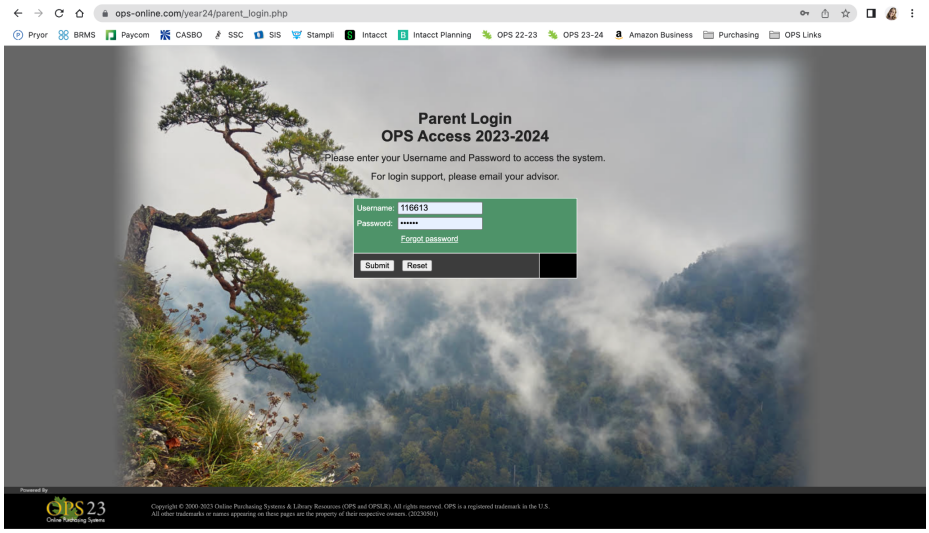
First, you need to make sure they have their school issued email ending in "@eacsstudent.org" with the corresponding password. If they need to reset the password because you do not have it, please contact Lauren Hansen or Alex Han (IT) to have it reset.
Once you have their email login credentials and OPS login information, please have them download Google Chrome and sign in to their Google Account in their web browser like it shows on this screenshot using their school email.



Next, copy and paste this OPS Parent Link to that web browser link after they sign in to their school Google account/email:

https://www.ops-online.com/year24/parent_login.php

Then have them sign in to OPS.



Once Signed in to OPS -> Go to the Purchasing Tab , select the student and click the Amazon Icon, Request Button it will prompt you to a new page and follow these instructions.
Amazon Punchout Instructions Link

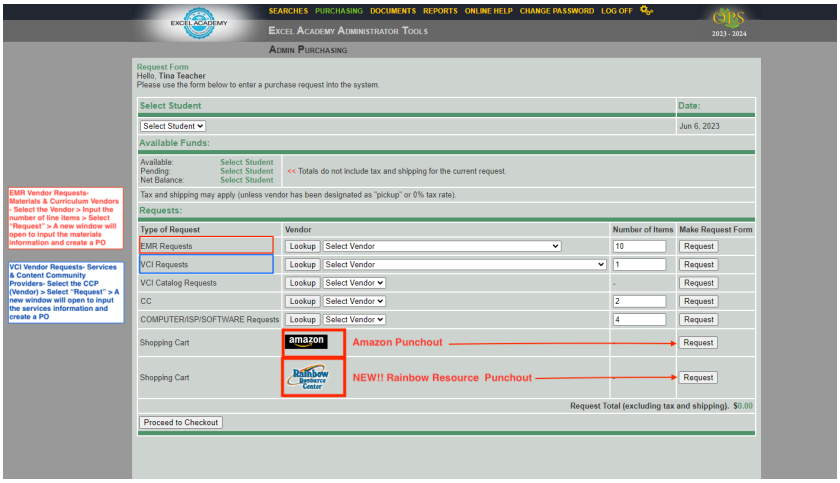
NEW!!! Rainbow Resource Punchout

1. Login to OPS portal.

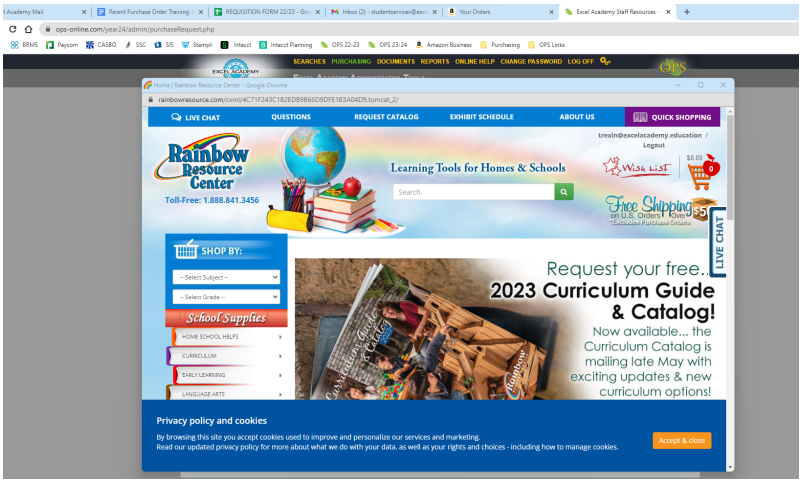
https://www.ops-online.com/year24/excel/

Parent - https://www.ops-online.com/year24/parent_login.php

2. Click on the Purchasing Tab



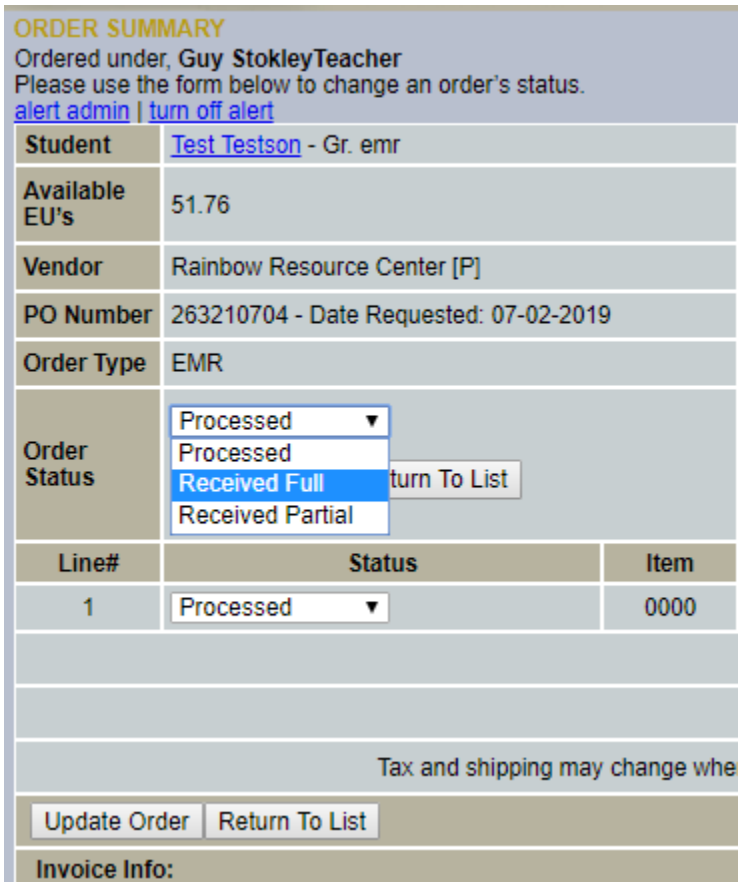
3. Click “Request” next to the Rainbow Resource PunchOut Icon to access the RRC website



4. Add items to cart and proceed to check out. Once you are done shopping in Rainbow Resource, checkout and it should take you back to OPS and generate a Purchase Order. The TOR will then approve the order and move forward to Administration for approval.

Marking EMR Orders Received

All materials are shipped directly to the students' residence. It is critical that the ToR mark the order received within 48 hours of receipt. For all materials received, the ToR verifies the contents of the box against the packing list. To mark an order received, locate the purchase order in OPS (see "Searching for Orders" section on how to perform a PO search). Change the status of each item received to "Received." When finished select "Update Order."



For damaged or missing items, leave status as "Processed" and place an internal note for our Business Services department and send an alert.

Use "Received Partial" only if part of the quantity of an item ordered has been received. Ex: 3 boxes of crayons were ordered and only 1 box was received. Place a note and alert the admin if an incorrect amount of items is received.

Approving EMR Orders Placed by Parent

Orders placed by parents must be thoroughly reviewed by ToRs to ensure that they meet Excel Academy ordering standards. Ordering Guidelines are available to ToRs and to parents as well.

EXAMPLE: In the below order placed by the parent, there are several issues that need addressing.

ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

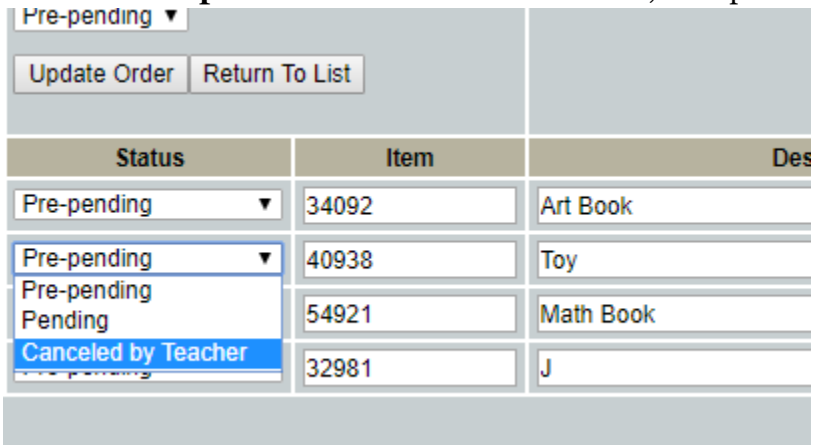
Student	Test Testson - Gr. emr	**Order Notes:**	Add internal note | View/Add PO note
Available EU's	955.95		
Vendor	Rainbow Resource Center [P]		
PO Number	263210760 - Date Requested: 07-03-2019		
Order Type	EMR		
Order Status	Pre-pending ▼ Update Order | Return To List		

Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pre-pending	34092	Art Book	Art	☑	1	10.00	10.00
2	Pre-pending	40938	Toy	Multi-Subject	☐	1	50.00	50.00
3	Pre-pending	54921	Math Book	Science	☐	1	15.00	15.00
4	Pre-pending	32981	J	Office/School Supp	☐	1	0.00	0.00
							Tax:	5.81
							Shipping:	15.00
			Tax and shipping may change when invoice matched.				**TOTAL:**	95.81

Update Order | Return To List

Invoice Info:

- Toys are not appropriate uses of student funds. To cancel this item, click on the drop-down box **on the specific line** and select "Canceled", then press "Update Order."



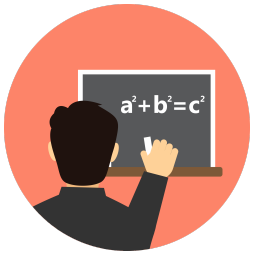
Item descriptions will not be as blatant as the above example. You must be judicious in scrutinizing each item on an EMR order.

- These item descriptions are incomplete. All orders must have the full name of the product in order to be approved and processed. Full Description of items must be in the Description section.
- Line item 4 has an incomplete item description and price. Look up the item number on the Rainbow Resource website (or whichever vendor the order is for) and find the correct item. Update the item description and unit cost to the correct item and press "Update Order" at the bottom.
- It is also the ToR's responsibility to ensure that items are correctly marked as consumable or non-consumable.

Once you have approved the items on the order, reviewed that the item numbers, descriptions and prices are correct, change the line item status using the drop-down to "Pending" and press "Update Order."

How to place a VCI order

Training video: ToR VCI Training



1. Check the provider's website OR CALL to confirm class description, cost and payment option (either monthly or lump sum—see item 6).

2. Follow the first two steps of the Placing EMR Orders.

3. Choose the correct provider name from the "VCI Requests" drop-down.

Select Student:			Date:
Testson, Test, test - 955.95 EUs			Jul 3, 2019
Available Funds:			
Student Totals Available: $955.95 Pending: $144.05 Net Balance: $955.95	<< Totals do not include tax and shipping for the current request.		
Tax and shipping may apply (unless vendor has been designated as "pickup" or 0% tax rate).			
Requests:			
Type of Request	**Vendor**	**Number of Items**	**Make Request Form**
EMR Requests	Select Vendor	8	Request
VCI Requests	TEST VENDOR, - TESTVEND	1	Request
VCI Catalog Requests	Select Vendor	-	Request
COLLEGE COURSE Requests	Select Vendor	2	Request
COMPUTER/ISP/SOFTWARE Requests	Select Vendor	4	Request
ACTIVITY Requests	Select Subject	1	Request
		Request Total (excluding tax and shipping). $0.00	
Proceed to Checkout			

4. Then, check for any **red notes** that will determine how the provider requests the order to be placed. This particular provider doesn't have any so there are none listed. Next, choose the most appropriate **"Category"** on the drop down menu, write a brief description of services, including the class's start date under the field **"Description,"** use the drop down menu to select the correct months, enter the cost per month or lump sum payment if lump sum was requested and click **"Add to Request."**

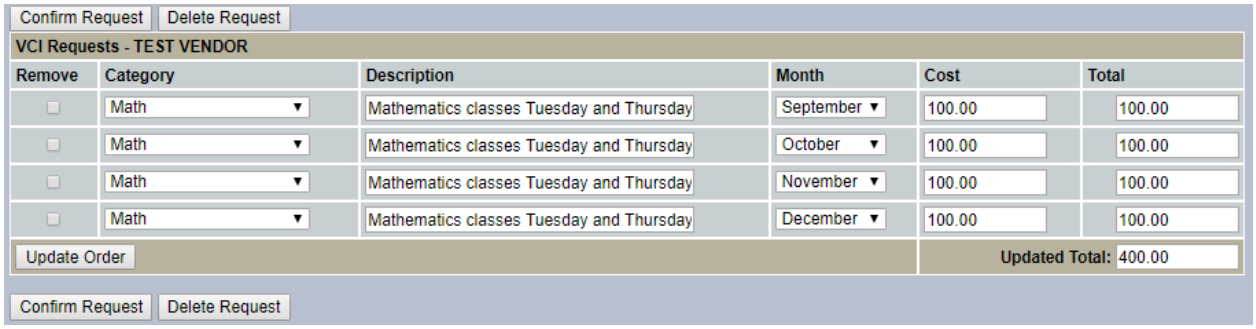
VCI Requests - TEST VENDOR (VENDOR NOTE: TEST VENDOR SET UP TO TEST THE VENDOR LOGIN)				
Category	**Description**	**Month**	**Cost**	**Total**
Math	Mathematics classes Tuesday and Thursday, start date 9/3	September to December	$ 100	$ 400.00
Request Total (from request page). $ 400.00	Add to Request			

- If placing an order for one month only, select the same month from both drop-downs.
- If placing an order for more than one month, select the first month of service to the last month of service. *The system will create as many POs as there are months that are selected.*
- If placing an order MID month, please be sure that you have notated the start date on the PO (the start date needs to be after the date the PO was submitted) and **ALERT** admin.

5. The months are divided into separate purchase orders. Community Providers have the option of being paid monthly or in a lump sum at the end of the class If the community provider requested to be paid monthly, costs will be entered for each month. Check for accuracy and click **"Add to Request."**
**If the student enrolls late and has a partial month of service please work with the CCP to figure out the pro-rated cost for a partial month of service.

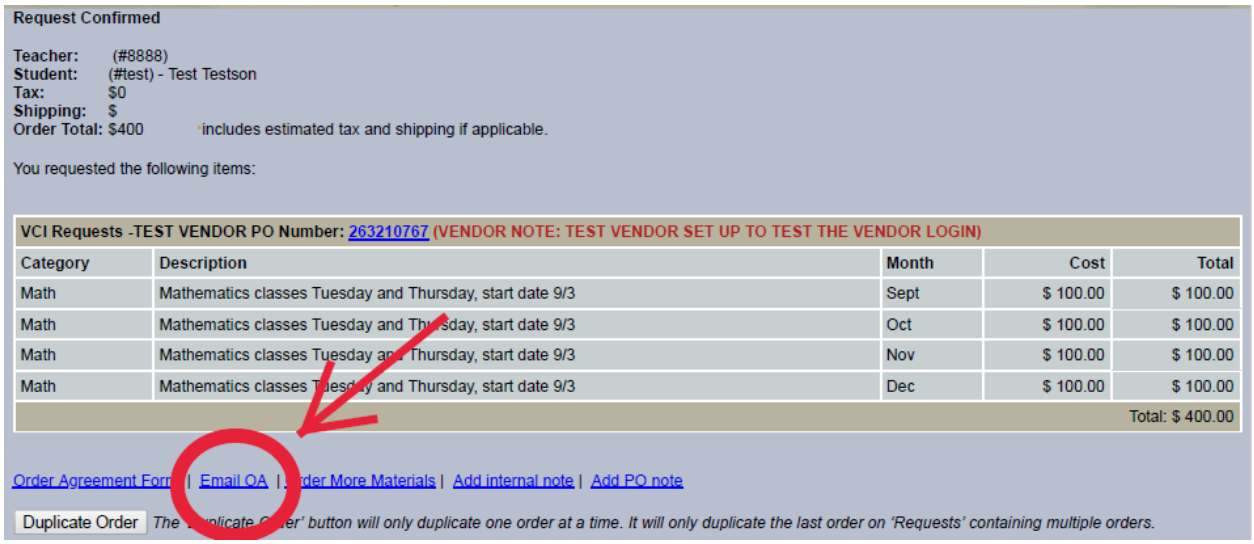
6. If the provider has requested to be paid in a lump sum at the end of the class, Please create a PO for ***last month of the class only.*** ToR will enter in the description line "Title of Class - Sept - Jan - Lump sum requested". Please hit Alert so the Student Services Department knows to send this notice to the community provider right away Check for accuracy and click **"Add to Request."**

7. After verifying all the information, click "Proceed to Checkout." Click on "Confirm Request" if all information looks correct.



8. **IMPORTANT:** On the next screen you **absolutely *MUST* click on EMAIL OA.** If you forget to email the OA, you can send it using these instructions.

Without this the provider will not be notified that a PO has been created and your student may not be able to receive the services requested.



Request Confirmed

Teacher: (#8888)
Student: (#test) - Test Testson
Tax: $0
Shipping: $
Order Total: $400 includes estimated tax and shipping if applicable.

You requested the following items:

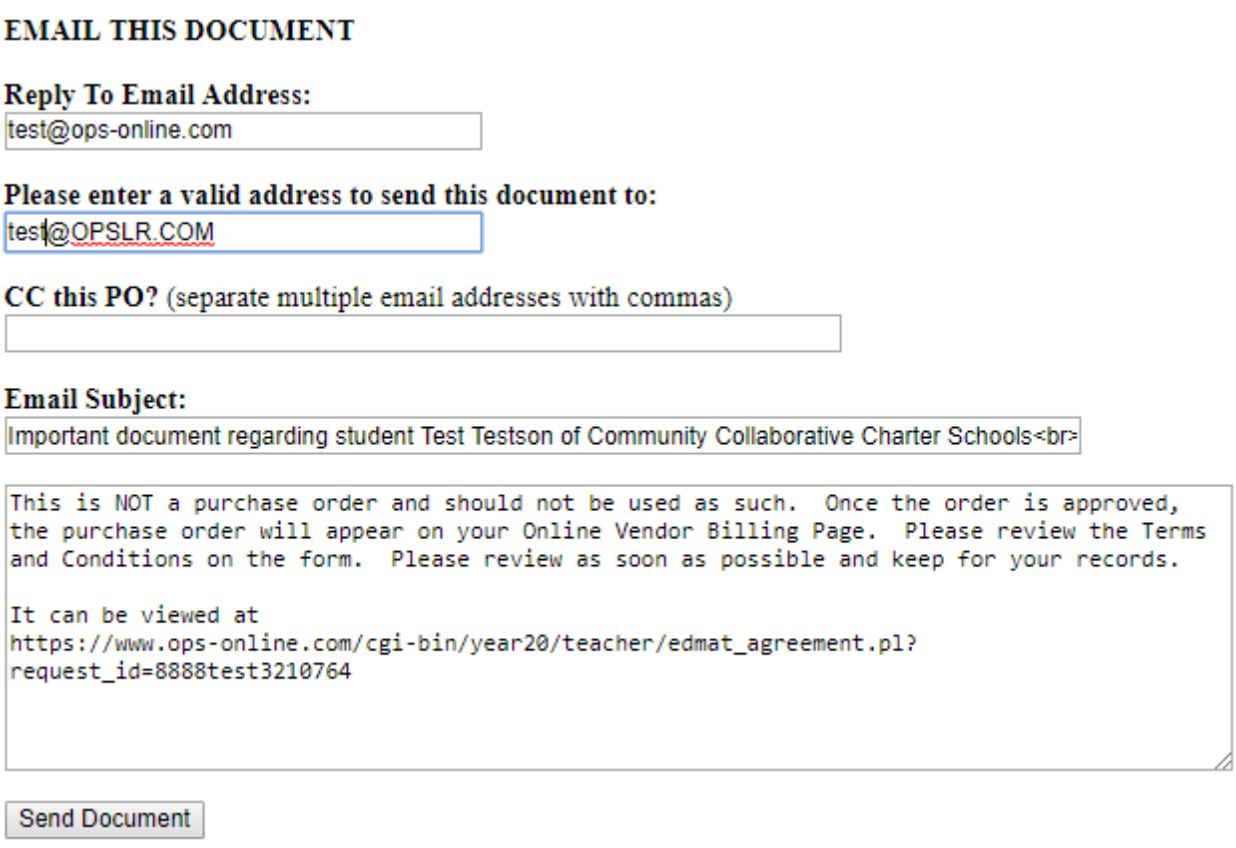
VCI Requests -TEST VENDOR PO Number: 263210767 (VENDOR NOTE: TEST VENDOR SET UP TO TEST THE VENDOR LOGIN)

Category	Description	Month	Cost	Total
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Sept	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Oct	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Nov	$ 100.00	$ 100.00
Math	Mathematics classes Tuesday and Thursday, start date 9/3	Dec	$ 100.00	$ 100.00
				Total: $ 400.00

Order Agreement Form | Email OA | Order More Materials | Add internal note | Add PO note

Duplicate Order *The 'Duplicate Order' button will only duplicate one order at a time. It will only duplicate the last order on 'Requests' containing multiple orders.*

On the next screen, click “Send Document”:



EMAIL THIS DOCUMENT

Reply To Email Address:
test@ops-online.com

Please enter a valid address to send this document to:
test@OPSLR.COM

CC this PO? (separate multiple email addresses with commas)

Email Subject:
Important document regarding student Test Testson of Community Collaborative Charter Schools

```
This is NOT a purchase order and should not be used as such.  Once the order is approved,
the purchase order will appear on your Online Vendor Billing Page.  Please review the Terms
and Conditions on the form.  Please review as soon as possible and keep for your records.

It can be viewed at
https://www.ops-online.com/cgi-bin/year20/teacher/edmat_agreement.pl?
request_id=8888test3210764
```

Send Document

9. Check to ensure the order was placed correctly by following the instructions in the Searching for Orders section to find and verify the POs.

Purchasing Online Courses

When placing a PO for an online course, please pay careful attention to the content providers notes as additional steps may be required. If the online course is an EMR, mark the order "Received" once the student receives access to the online course. **ALL ORDERS PLACED FOR ONLINE CONTENT PROVIDERS MUST INCLUDE THE PARENT FIRST AND LAST NAME ALONG WITH THEIR EMAIL ADDRESS IN THE PO DESCRIPTION LINE.**

Internal Notes

1. You can make an internal note when you first create the purchase order or you may search for the purchase order and add an internal note later. To find the order, please follow the instructions in the Searching for Orders section.

2. Then find the purchase order that needs the internal note and click on the Purchase Order number. You will be taken to the order summary page.

ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

Student	Test Testson - Gr. emr	**Order Notes:**	Add internal note | View/Add PO note
Available EU's	555.95		**Charles McCook** Wednesday July 3rd 2019 Teacher was alerted
Vendor	Rainbow Resource Center [P]		**Charles McCook** Wednesday July 3rd 2019 Hi, is the amount correct on this order?
PO Number	263210704 - Date Requested: 07-02-2019		
Order Type	EMR		
Order Status	Processed ▼ Update Order | Return To List		

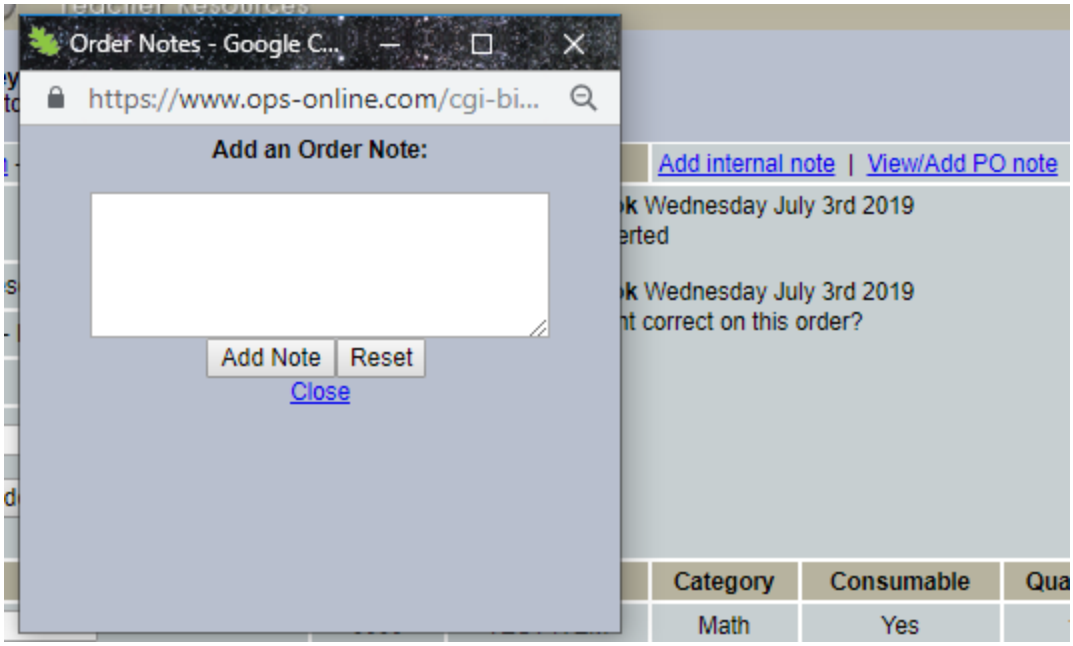
Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Processed ▼	0000	TEST ITEM	Math	Yes	1	1.00	1.00
							Tax:	0.08
							Shipping:	15.00
			Tax and shipping may change when invoice matched.				**TOTAL:**	16.08

Update Order | Return To List

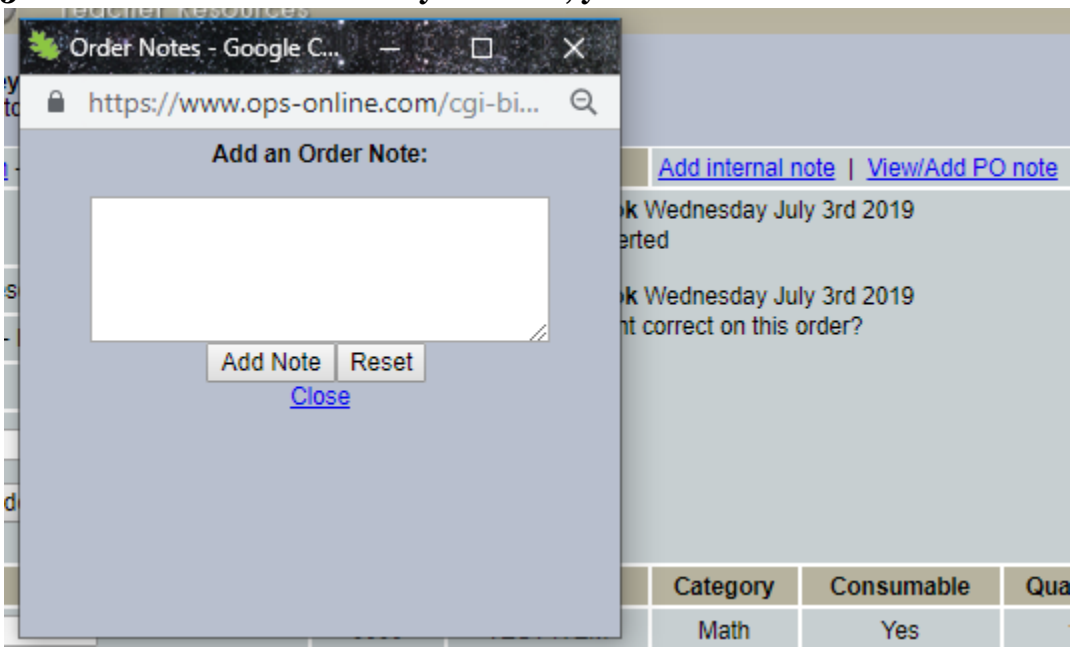
Invoice Info:

3. Click on **"Add Internal Note."**

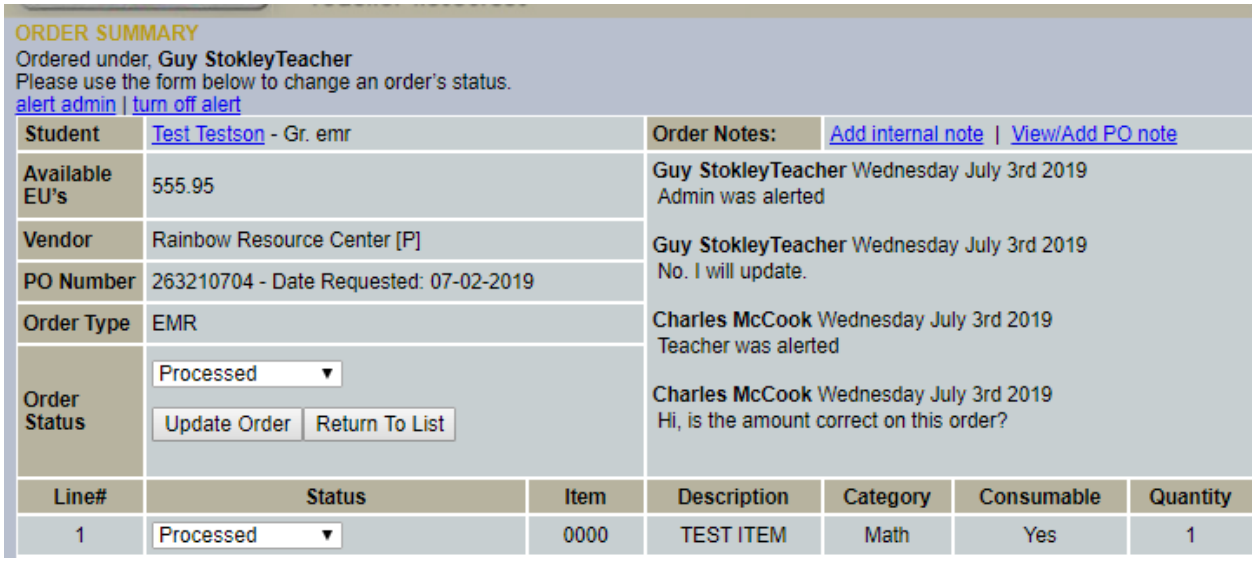
4. A small dialog field will then pop up in the left hand corner of the screen. Enter the internal note and click the field **"Add Note."**



5. In order for admin to see your note, you must click on "Alert Admin to Note."



6. To confirm your note was added and admin was alerted, check the Order Summary.


ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

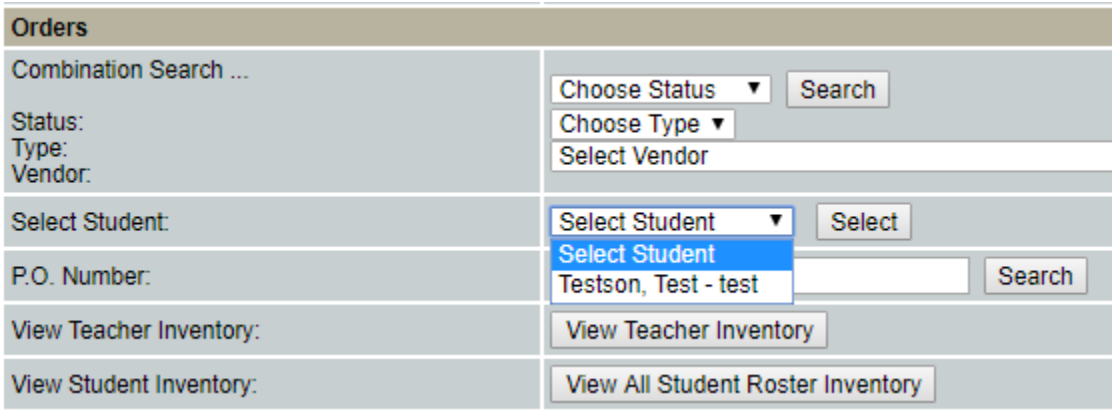
Student	Test Testson - Gr. emr	**Order Notes:**	Add internal note | View/Add PO note
Available EU's	555.95	**Guy StokleyTeacher** Wednesday July 3rd 2019 Admin was alerted	
Vendor	Rainbow Resource Center [P]	**Guy StokleyTeacher** Wednesday July 3rd 2019 No. I will update.	
PO Number	263210704 - Date Requested: 07-02-2019	**Charles McCook** Wednesday July 3rd 2019 Teacher was alerted	
Order Type	EMR	**Charles McCook** Wednesday July 3rd 2019 Hi, is the amount correct on this order?	
Order Status	Processed ▼ Update Order | Return To List		

Line#	Status	Item	Description	Category	Consumable	Quantity
1	Processed ▼	0000	TEST ITEM	Math	Yes	1

The Order Notes will display your note, and indicate that the alert was sent. If the alert was not sent, you can send it again by clicking "Alert Admin."

Searching for Orders

1. Once the order is placed, you can find it by clicking on the "Searches" tab on the top. Under the "Orders" section, select the student whose orders you would like to see.


Orders

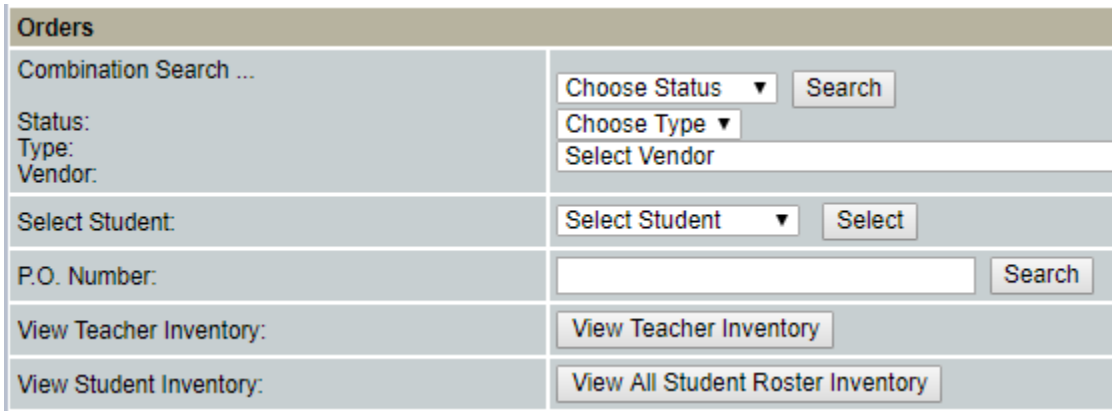
Combination Search ... Status: Type: Vendor:	Choose Status ▼ Search Choose Type ▼ Select Vendor
Select Student:	Select Student ▼ Select Select Student Testson, Test - test
P.O. Number:	Search
View Teacher Inventory:	View Teacher Inventory
View Student Inventory:	View All Student Roster Inventory

2. On the subsequent page, you can see all orders placed for that student.

Orders Search
Your search has returned 7 results.

Request #	Purchase Order #	Order Status	Req Type	Req Date	Student	Vendor	Orig Cost	Tax	Use Tax	Shipping	Actual Cost	Order Stat Date
8888test3200186	263200186	Canceled	EMR	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200187	Canceled	VCI (Sept)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200188	Canceled	VCI (Oct)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200187	263200189	Canceled	VCI (Nov)	05-01-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-01-2019
8888test3200264	263200264	Canceled	VCI (Sept)	05-03-2019	Test Testson		0.00	0.00	0.00	0.00	0.00	05-03-2019
8888test3210704	263210704	processed	EMR	07-02-2019	Test Testson	Rainbow Resource Center [P]	1.00	0.08	0.00	15.00	16.08	07-03-2019
8888test3210704	263210705	Pending	EMR	07-02-2019	Test Testson	Amazon	1.00	0.08	0.00	15.00	16.08	07-02-2019

3. In OPS, there are many ways to find the orders you are looking for. Instead of the above process, you can also use the Order Combination Search under the “Searches” tab.



On the combination search, you may designate multiple criteria to assist you in locating orders. If you would like to see all orders of a particular status, type, or provider, you may select that criteria from the drop-down list. You may also combine this criteria: for example, select “Pending” and “VCI” from the Choose Status and Choose Type drop-downs to see all pending VCI orders. **TIP:** Scrolling through a long list of providers can be a daunting process. When you click on the drop-down menu, you may begin typing the name of the provider you are searching for. The list will then jump to that provider.

Training video: ToR Order Search Training

Content & Community Provider-Specific Order Instructions

Certain providers have specific ordering instructions. These providers include, but are not limited to:

- Amazon
- ASTEME Learning Center
- Staples
- Start ASL

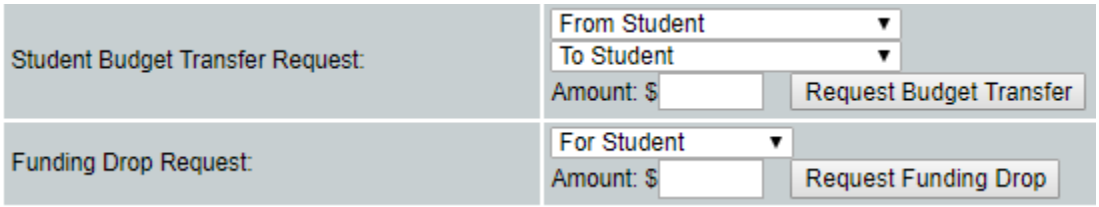
- Teachers Pay Teachers
- Time4Writing
- Urban Workshop

These instructions are located in the Student Services Department Ordering Instructions folder. Along with Provider-specific ordering instructions, this folder will also contain processes that will assist you in completing your duties as a ToR.

Transferring Funds Between Siblings

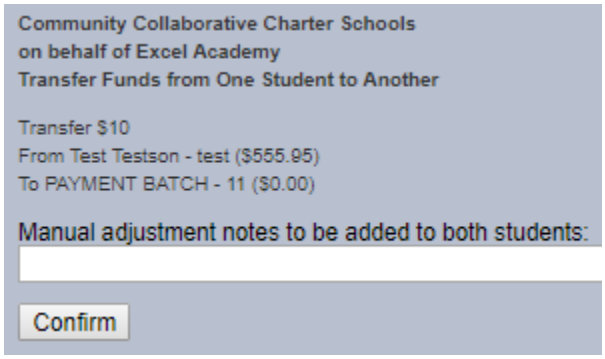
Excel Academy Charter School allows families to transfer funds between siblings to place combined orders to save on shipping costs. **It is the ToR's responsibility to ensure that each student has core curriculum in place and is sufficiently supported in their education.**

To place a budget transfer request, navigate to the "Searches" tab, and scroll to the "Students" section. There, you will see the "Student Budget Transfer Request."



Select the student FROM whom you would like to transfer the funds, and the student you would like to receive the funds. Then, enter the amount and select "Request Budget Transfer."

On the next screen, you MUST add an explanation for the request. Enter why the request is being made, then click confirm.



The BusinessServices Department will review the request and decide whether to approve or deny. ALL REQUESTS WITHOUT EXPLANATIONS WILL BE DENIED.
Fund transfers between siblings must be for:

- ❖ Core Subjects Only
- ❖ Tutoring is OK

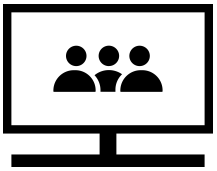
- ❖ $350 per allotment
- ❖ Combined orders to save on shipping costs

Instructional Funds Amounts

Personalized Path
TK-8th $2,900

High School $3,400

The IFs are disbursed in multiple allotments:
TK - 8th $1,450 in August, $1,450 in November
High School $1,650 in August and $1,650 in November



Virtual Path
1st - 8th $1600

The IF's will be disbursed in multiple allotments:
1st - 8th $800 in August, $800 in November

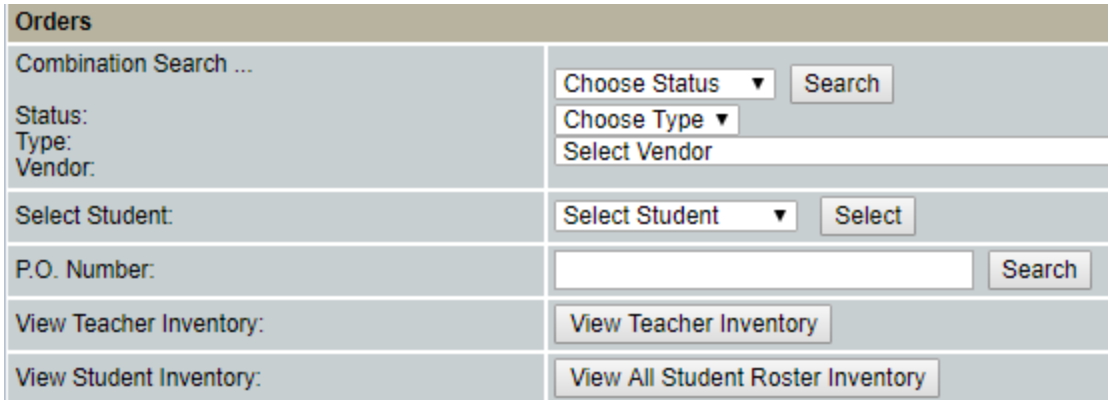
Disallowed Items

Please refer to the "Ordering Guidelines" Google Doc for a detailed list of allowed/disallowed items. It is available on the website.

Returning Materials

All non-consumable materials are property of Excel Academy Charter School and must be returned when the student withdraws from Excel Academy. This needs to be explained to the parent at the initial meeting. Please collect materials at the time of withdrawal.

To view the list of outstanding student materials, go to the "Searches" tab and scroll to the "Orders" section. Click on "View All Student Roster Inventory."



Staying Within Budget

The ToR is responsible for making sure the student stays within budget. This is a very important part of the ToR's job. Do not rely on the parent to stay within budget. In order to make sure you are staying within budget, you must estimate an extra 30% for EMR orders to account for shipping and tax. Once our student services department has paid the final bill, an accurate total will be updated in OPS. This is especially important to pay attention to in the spring when the ordering window is closing and parents are sending off many material orders to use up the remainder of funds.

No Out of Pocket Payments

Parents will not be reimbursed for the curriculum. It is critical to make parents aware of the ordering procedures so that they don't believe they can hand you a receipt and expect reimbursement. Under no circumstances will parents be reimbursed.

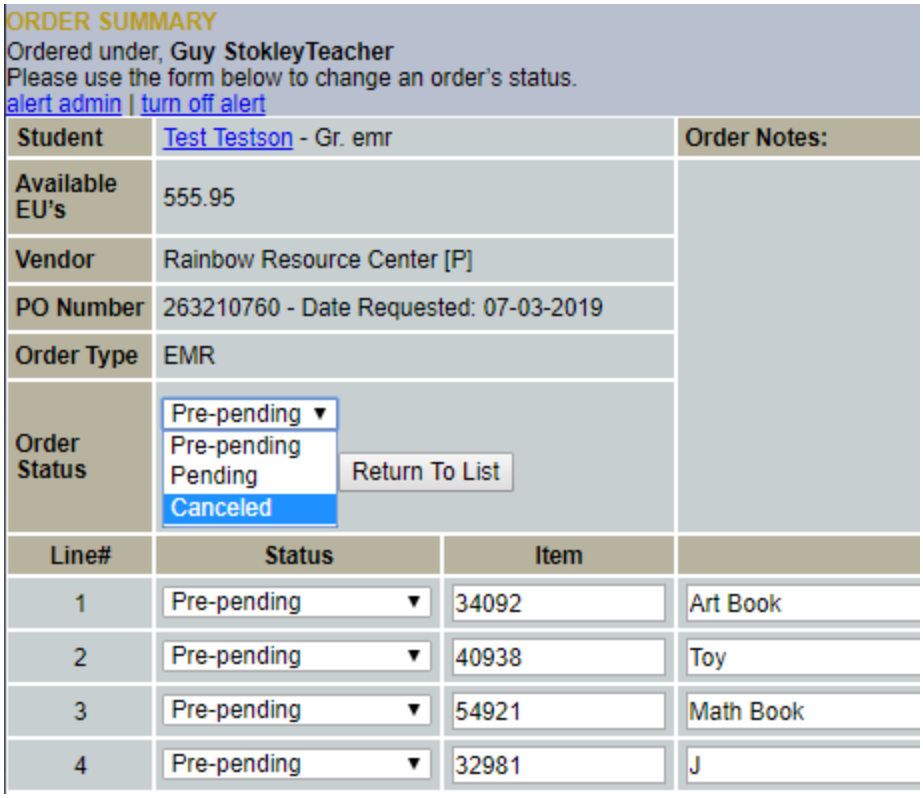
Basic Materials Only

All EMR orders must be basic school supplies. In other words, we can only purchase the type of supplies that could be found in a brick and mortar public school. We also cannot pay for high priced/overpriced lessons, classes or materials. Please refer to the "Ordering Guidelines" Google Doc for a detailed list of allowed/disallowed items.

Cancellation Policy

We cannot cancel an EMR order after they are processed and sent to the content provider. Once materials are requested, the Student Services Department will order them and they cannot be canceled. If an order has not been processed and is still in "Pre-Pending Status," the ToR can cancel or edit the purchase order in OPS. For VCI orders, community providers must be notified of cancellation prior to orders being canceled in OPS. It is the responsibility of the ToR to ensure that the community provider has been notified and any outstanding payments have been reviewed and adjusted accordingly in OPS.

To cancel a purchase order in the pending stage, you must pull up the purchase order by completing a search. Then click on the drop down menu **"Pre-Pending"** and choose **"Canceled."** Then click **"Update Order."** If you don't click **"Update Order"** the order will not cancel.



ORDER SUMMARY
Ordered under, **Guy StokleyTeacher**
Please use the form below to change an order's status.
alert admin | turn off alert

Student	Test Testson - Gr. emr	Order Notes:
Available EU's	555.95	
Vendor	Rainbow Resource Center [P]	
PO Number	263210760 - Date Requested: 07-03-2019	
Order Type	EMR	
Order Status	Pre-pending ▼ (Pre-pending, Pending, Canceled) Return To List	

Line#	Status	Item	
1	Pre-pending ▼	34092	Art Book
2	Pre-pending ▼	40938	Toy
3	Pre-pending ▼	54921	Math Book
4	Pre-pending ▼	32981	J

When orders are canceled the funds are automatically returned to the student account.

Backordered items

When items are backordered, two things *can* happen. Sometimes our Student Services Department is notified by the content provider and will send you an alert in OPS. Other times, we find out when we get the order and the item is not with the other items in the box. Usually there will be a note on the packing slip that the item was backordered. If this happens, search for the purchase order in OPS and add an internal note. Backordered items are especially unfortunate when we find out after the end of the ordering window in spring. If it is past the ordering window, the parent cannot request an alternate item. Please encourage families to complete their orders well in advance of the deadline.

Ordering Deadline
April 12th, 2024 is the deadline for the parents to get PO requests submitted for review. ToRs will submit all approved orders requests no later than April 26th, 2024. After the deadline, no purchase orders can be submitted. IFs do not roll over from year to year. If the IFs are not used by the deadline, the parent will no longer have access to them.

It is a good idea to **periodically check your students' funds**. Funds should be used evenly throughout the year and not all at once at the end of the year. The Ordering Guidelines state that excessive quantities of anything will be rejected, and this likewise applies to extremely large orders at the end of the year.

For EMR orders late in the year: Students must reasonably be able to use all items by the last day of school. If the Student Services Department believes not all items can be used in time, you will be asked to cancel some from the order.

Computers

Each year we will put out a list of computer providers and the items that may be purchased from them. We will not allow any computer purchases from providers or items that are not on that list. The list may continue to change throughout the year and we will keep you updated as to what the current selections are. To place a computer order, you will follow all of the above instructions for content providers. (Computers may come either to the office in Irvine, or to your house, depending on the provider. You will be notified if a computer arrives in the office for your family.)

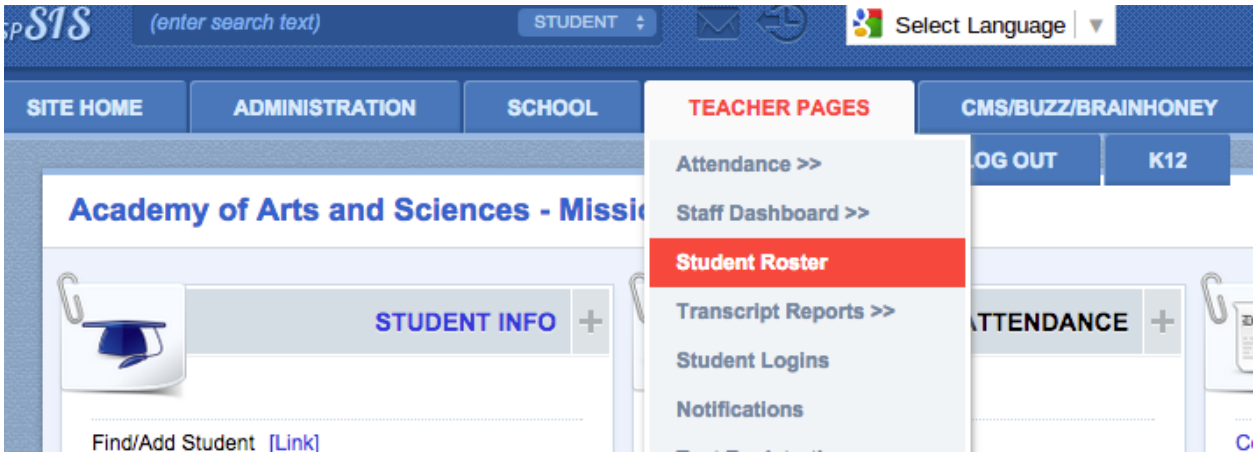
Other Questions

For other questions, please read the materials in the Student Services Department Ordering Instructions folder in the Shared Drive and the ToR FAQ.

How to Access Student Roster in SIS

LOGINS for SIS scopes
https://excelcs.plsis.com/mod.php/login.php For students in "ExcelCS " Scope
https://exceleast.plsis.com/mod.php/index.php For students in "ExcelEast" Scope

Once the ToR has logged into SIS, go to "Teachers," then "PLS/Student Roster."



The student roster will appear. Check to see that the correct dates and semester are showing at the top. If the date needs adjusting, make sure to click "Update" (under the first large blue and white box) after the date and/or semester has been changed. To print a roster, click "Print/Export" under the first large blue and white box.

ToR Roster in SIS

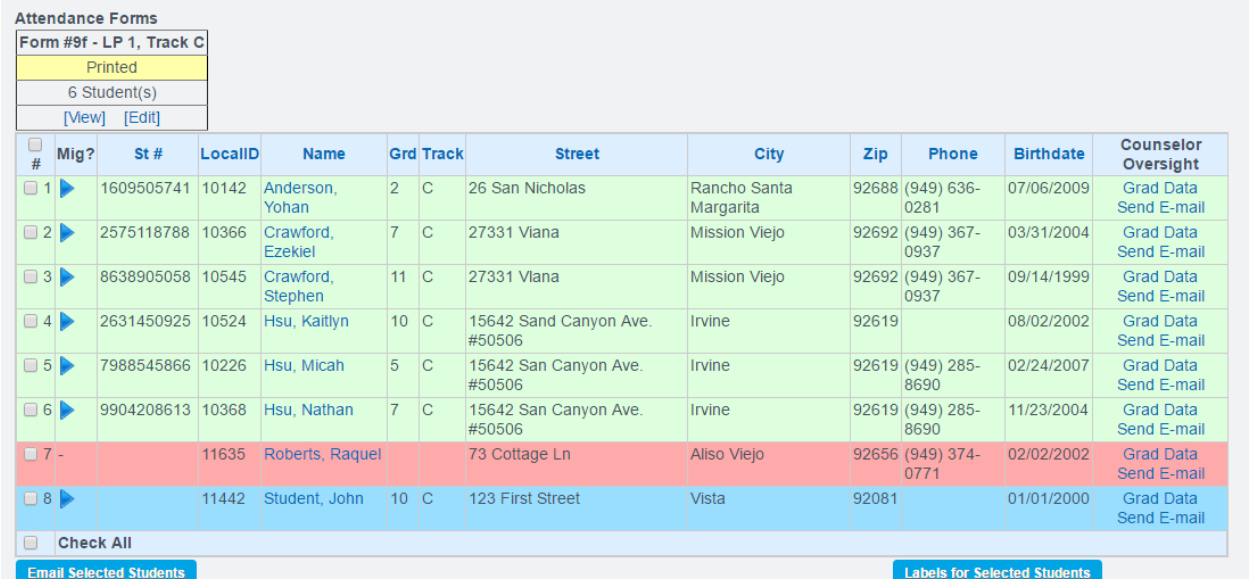
Enrollment status and Additional Information

Each time the enrollment team assigns a student to a ToR after school begins, the student will be highlighted in RED in the PLS/Student Roster portion of the teacher's roster. This notifies the ToR that the student has been added, but still needs to ***verify the exit date*** *of when they withdrew from their previous school.* They can verify this date by having the parent send their

ToR an email stating the date they withdrew from [list name of previous] school. The ToR needs to forward this email to admissions@excelacademy.education. The student will NOT be able to start school until the day they turn in their withdrawal email verification to our admissions clerk and are not fully enrolled in our school. A finalized master agreement is what finalizes their enrollment. ToRs should communicate this to a new family. Additionally, most secondary students need an unofficial transcript before MAs can be created (please see below).

Once admissions has received exit date verification, or if it is before the first day of the school year, the student will be given a pre-enroll date and they will show up in the ToR SIS roster in BLUE. This indicates that the MA is ready to be prepared and sent to the family for signature. (**Note**: **Every student will show up in BLUE before the school year starts. We do not need withdrawal verification before the first day of school 08/28/2023**)

When the MA has been signed and approved, the student will show up in GREEN on the SIS roster. The student in green is now active in school and will acquire attendance.



Attendance Forms

Form #9f - LP 1, Track C

Printed

6 Student(s)

[View] [Edit]

#	Mig?	St #	LocalID	Name	Grd	Track	Street	City	Zip	Phone	Birthdate	Counselor Oversight
1	▶	1609505741	10142	Anderson, Yohan	2	C	26 San Nicholas	Rancho Santa Margarita	92688	(949) 636-0281	07/06/2009	Grad Data Send E-mail
2	▶	2575118788	10366	Crawford, Ezekiel	7	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	03/31/2004	Grad Data Send E-mail
3	▶	8638905058	10545	Crawford, Stephen	11	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	09/14/1999	Grad Data Send E-mail
4	▶	2631450925	10524	Hsu, Kaitlyn	10	C	15642 Sand Canyon Ave. #50506	Irvine	92619		08/02/2002	Grad Data Send E-mail
5	▶	7988545866	10226	Hsu, Micah	5	C	15642 San Canyon Ave. #50506	Irvine	92619	(949) 285-8690	02/24/2007	Grad Data Send E-mail
6	▶	9904208613	10368	Hsu, Nathan	7	C	15642 San Canyon Ave. #50506	Irvine	92619	(949) 285-8690	11/23/2004	Grad Data Send E-mail
7	-		11635	Roberts, Raquel			73 Cottage Ln	Aliso Viejo	92656	(949) 374-0771	02/02/2002	Grad Data Send E-mail
8	▶		11442	Student, John	10	C	123 First Street	Vista	92081		01/01/2000	Grad Data Send E-mail

Check All

Email Selected Students

Labels for Selected Students

Note that the ToR can see the student's full name, birthdate, and contact information in each stage.

The ToR will now be able to see all the necessary information to make initial contact with all of their families.

RED- Do Not Enroll-Parent *needs to send enrollment* ***verification of the exit date*** *of when they withdrew from their previous school.* Parents may send ToR an email stating the date they withdrew from (name of) school. Upon receipt ToR sends the email to admissions and registrar. Please see below for Prospective Student Contact instructions.

All incoming secondary students must submit their academic records including an unofficial transcript and report card in order to process the Course of Student and create the MA. The

only exception is for foster, homeless (McKinney Vento) youth - these students must be enrolled immediately. ToRs should remind families to submit these. They may email the ToR or send to the Registrar - registrar@excelacademy.education.

BLUE- Enroll! MA is ready to be sent to the parent for signature. It's in the student's best interest for the parent to sign and return the MA the day they first receive it so as not to lose any funding. However, ensure that you follow the procedures laid out for contacting families and that they understand the responsibilities of the parent before you send the MA.

GREEN- You did it! You have successfully enrolled your student with Excel Academy.

How to Add Student Courses in SIS

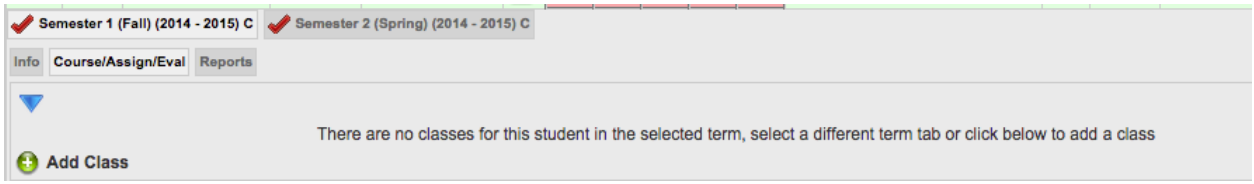
(High School and JH students taking high school-level courses only)

Before the beginning of the school year, ToRs must add high school courses in SIS. ***TK - 8th grade students will have their courses loaded for them. If a TK-8th grade student is missing their preloaded courses add their names and the needed information*** *onto the TK-12 Missing Students Classes/Curriculum doc. All Tk-8 students should have five classes for their grade level: math, language arts, science, social studies and PE. If you need to add an advanced curriculum for 5th or 6th grader, please use the instructions below. If you need to add a HS course for an advanced 7th or 8th grader, please use the instructions in the linked bookmark. Upon approval, junior high students may enroll in a high school math and/or world language course.*

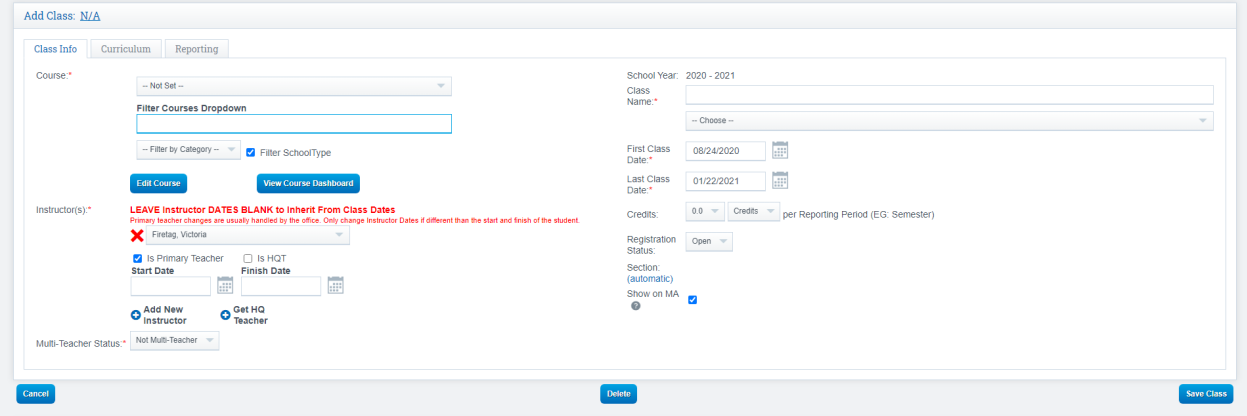
High school courses for both semesters need to be added at the beginning of the year to create the Master Agreement. Consult the High School Course Catalog for course descriptions, codes, for prerequisites. Please watch this video for Adding Classes to SIS before creating a master agreement.

Instructions:

1. Once in the roster in SIS, click on the blue arrow next to the student's name. The box will expand and no courses should show. Click on the green **Add Class** button. You will be directed to the next screen.



2. This box below will open up. Please watch the ToR training video on How to Add Courses in SIS, which will give a thorough explanation of what information to choose in this box. Click here for written instructions.



3. **If you cannot locate a course in SIS:** Try searching with multiple keywords and filters. If your course is missing from SIS, please add it to this doc.
    a. For a-g courses, the course names will be prefaced by CP, BYU, EDG, EDY (except for ASL), FLV, LB, and TGS.
    b. For junior high school students taking high school courses, you will need to unclick the "Filter School Type" to find the high school courses.

How to Create a Master Agreement

The Master Agreement (MA) is a student-parent-teacher contract outlining the conditions and responsibilities of all parties for our independent study at Excel Academy. When a student opts into independent study, Ed Code requires that there is an agreement as to how it will be completed. This document fully enrolls a student.

The MA lists all of the courses that a student is attempting during the school year. TK-6th grades students will have courses loaded automatically by the back office. ToRs will add classes for 7th through 12th grade students.

If a TK-8th grade student is missing their preloaded courses, please add their names and the needed information onto the TK-12 Missing Students Classes/Curriculum doc. Important: An MA cannot be completed for a student if the student is missing classes!

Dates and signatures on a master agreement are very important:

- The student's signature date marks the first day of attendance for that student.
- Dates should NEVER be altered on a master agreement.
- The parent and student must sign/type first and last names in the designated areas. Last names must be included for parents and students older than 1st grade. You must send it for a new signature if it is not signed correctly.
- Any parent or guardian who will sign attendance must be listed as a signatory on the MA.

Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum.

Resources

How to Create a Master Agreement- video
Step-by-Step directions for TK- paper
Step-by-Step directions for HS- paper

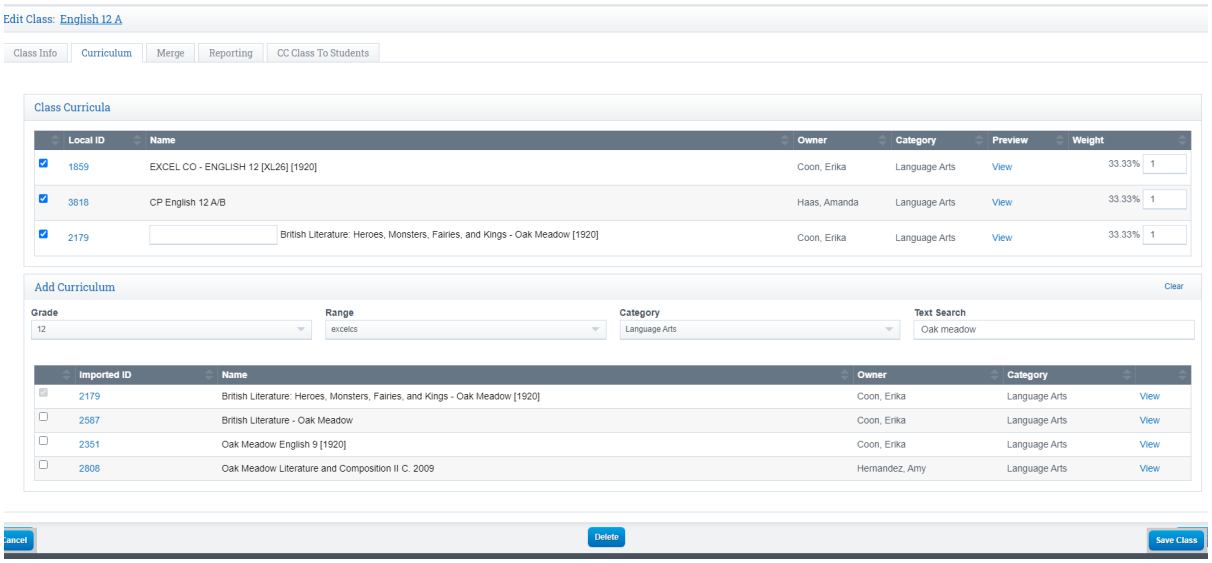
Signed MA's bridge with the ordering system overnight.

How to Add Curriculum Content to a Course in SIS

You must add curriculum content to all classes. Curriculum content is the scope and sequence of the course in the form of lists of objectives/standards and assignments associated with textbooks, classes, or the state standards. You can add curriculum content when you first add a course or at any point in the year. Some TK-8 curriculum content will be pre-populated. Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum.

Please watch these helpful videos and read the directions below:
Introduction to Curriculum Content
Adding Curriculum Content to Courses in SIS

1. To add/edit curriculum content from the dashboard, choose the green icon next to the student's course.
2. Choose the "Curriculum" tab to open the search.



3. Use the filters to find the correct curriculum and click the box next to the desired curriculum content to add it. You may add a single or multiple curricula to any TK-12 course to individualize the student's record.
    a. Always add the standards to TK-8 courses, in addition to any specific textbook-based curriculum content, so you can use them when students work on teacher-created assignments or curriculum that is not in SIS.
    b. For high school a-g courses, **you must use the CP curriculum content as the default if the specific curriculum for the CCP or textbook is not in SIS.**

4. For additional detailed information about choosing appropriate curriculum, see the section *How to Complete AWRs*.

How to Create an Addendum

Addendums are created for a variety of clerical purposes that are a *change* to the original MA:

- A transfer of a student to a new ToR
- An update to the student's classes (adding or changing a class)
    - Addendums are not needed when a student drops a class.
- Adding an additional parent or guardian signatory
- Changing the student's grade level

Addendums are dated **the date of change**. This is very important that the date is correct because it affects attendance, samples, and all ancillary documents in SIS.

Addendums are only created after the first day of instruction. If an adjustment is needed prior to the first day of instruction a new MA is created.

Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum before creating an addendum for high school students.

Resources:
How to create and save an addendum

How to check Grid Logs for Engagement

How to check grid logs for a single student:

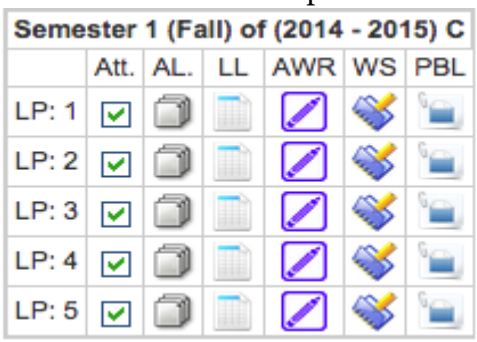
1. In SIS, go to "Teacher Pages" and go to your student roster.
2. Choose the drop down arrow next to the student name.
3. Choose the 'reports' tab.

4. Choose the learning logs icon for the correct LP. This will open to the learning logs page. Make sure the Log type reads 'grid log check' and choose 'review log' button.
5. This should open the student's grid log. You are able to make edits and updates from this page.

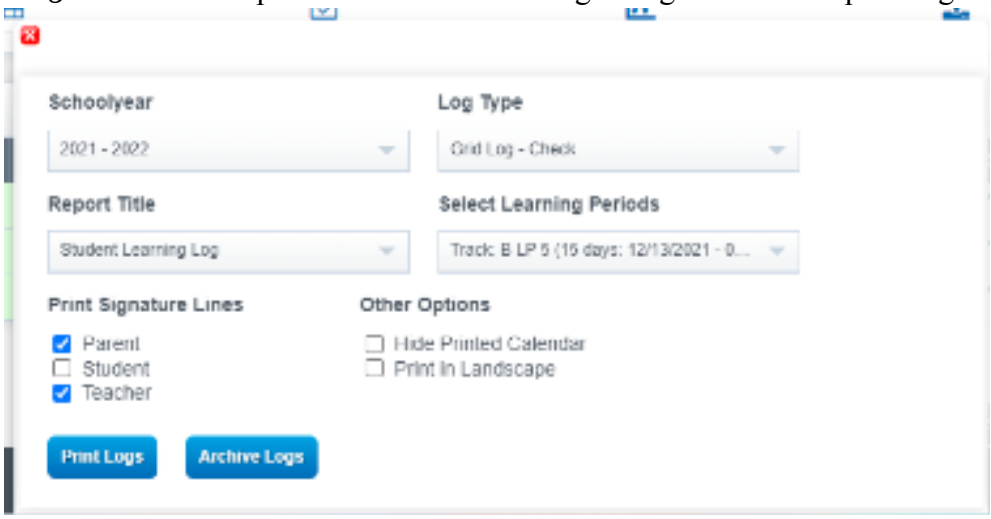
How to check grid logs for your entire roster:

1. In SIS, go to "Teacher Pages" and go to your student roster (instruction video here)

2. Once there, go to the box located above your roster and click on the "LL" icon next to the correct learning period (image #1 below). If you are using the 'new student roster' you will click the drop down for 'mass print reports' (image #2 below).



3. A box will open. In this box choose "grid log check" and 'print logs"



4. This will load all grid logs for your entire roster. Check if they are current and make contact with those parents that are not. Follow the re-engagement procedure if they are not current. If you need to make changes to the grid log to reflect student engagement as dictated by the parent, use the instructions above for How to check grid logs for a single student.

How to Take Attendance in SIS ☑

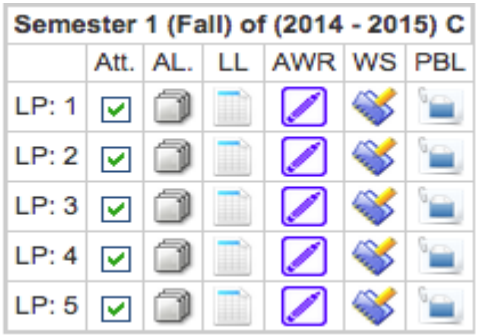
Each ToR will officially claim attendance by the Wednesday following the last day of each learning period.

Prior to claiming attendance, a ToR should have met each student, reviewed the student's body of work, and collected samples for the respective learning period.

First, make sure that all Attendance Grid Logs are sent out on the last day of the learning period. Make sure that the days in which a learning activity took place are checked. They cannot be sent *before* the last day of the learning period. Parents will sign electronically. You will be automatically notified via email that the parent has signed the grid log. Follow the link to the grid log to sign or find the log in your 'Sign Document Compliance' section of SIS. . You will sign **AFTER** the parent does.

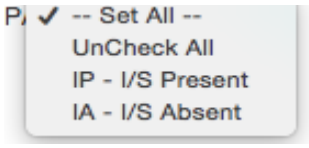
Second, once **all** of your attendance grid logs are returned, take attendance for your whole roster. Your signature should fall on a work day, not a weekend or holiday. (A parent signature on a weekend or holiday is fine.)

To do so, log into SIS, go to "Teacher Pages" and go to your student roster. Once there, go to the box located above your roster and click on the "Att" ☑ icon next to the correct learning period. (see below)



Your entire month of attendance will open up for your roster. There is a box at the top left of the screen with a drop-down menu that will allow you to claim all attendance at once rather than having to do it manually one student at-a-time.

Your entire month of attendance will open up for your roster. There is a box at the top left of the screen with a drop-down menu that will allow you to claim all attendance at once rather than having to do it manually one student at-a-time.
Change all students to IP – I/S Present and click the "Save" button on the screen.



You will be unable to change attendance once you click "save," so please proceed carefully.

You will then print and archive your attendanceThese are helpful slides and a helpful video on this procedure .

How to Complete AWRs

AWR= "Assignment and Work Record"

AWRS are a digital list of work assigned to a student. It is, essentially, a gradebook with no grades. Teachers of Record create AWRs for each student to show assignments that work towards progress in their grade-level standards and curriculum.

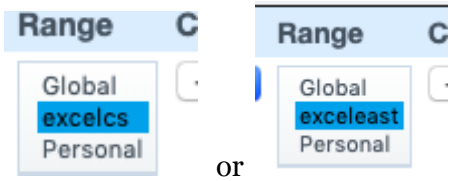
AWRS (Assignments and Work Record) must be completed before the beginning of each LP. This pre-loading of objectives and assignments will create a default pacing guide, and help hold the home educator accountable for progress. After meeting with families, the AWRs should be reviewed and/or adjusted to reflect the actual work completed and reflected in the body of work.

AWRs Fundamentals:

- Choose objectives/standards that were attempted and the assignments that correlateEach module must have objectives and assignments
- Reflect the number of days in the LP
- Utilize most up-to-date curriculum in SIS
- Add any applicable curricular that is part of the core curriculum

Please use the curriculum/textbook your student is using, if at all possible:

1. Curriculum content must be added to a course before AWRs can be loaded. Curriculum content is the scope and sequence of the course in the form of lists of objectives/standards and assignments associated with textbooks, classes or the state standards.
2. When choosing a curriculum content for your AWRs, make sure you are selecting the curriculum from the proper range (excelcs or exceleast).



or

3. Make sure you are looking at the correct edition. Usually, you can still use a different edition, but check off the assignments in a different order, as the books are usually very similar.
4. If you are using a curriculum already in the system, make sure it has both *Objectives and Assignments listed*.

5. For any new curricular requests, there will be a review process, a submission window and deadlines. Please contact your education coordinator for the appropriate deadline.

If your textbook is not in the system, please choose standards for the TK-8th student, and high school students should be choosing the corresponding CP curriculum content:

1. Choose the current grade level standards for Math or Language Arts.
2. Science and Social Studies may be outside of the grade level for TK-8, but you must use the multi-grade level standards found in **"excelcs" and "exceleast."** (Make sure that 6-8th grade students hit all of the science for those grade levels before high school, if they decide to go out of the order listed in the standards.) **You can use the search function with the keyword 'Excel' to find these.**
3. Standards that are in SIS mainly read as objectives. Each module must have both objectives and assignments. If you must use curriculum content that do not have assignments listed, you must add assignments as custom comments. (For example: Student will complete worksheets. Student will read textbooks. Student will complete assessments on the above objectives/standards.)

Step -by-step instructions are below. You can also watch this video on how to complete AWRs: Adding AWRs from Assigned Curriculum

AWRs Step-by-Step

Before the new LP:

1. From your roster page, choose toggle the arrow next to a student's name to see all of their classes.
2. Choose the curriculum that you want to populate and the LP# next to that curriculum. This will open your "add/edit assignments" window.
3. Type in the 'assigned on' date. It will be the first day of the learning period.
4. Click on the module that you want to open.
5. Choose any additional objectives that will be attempted and methods/assignments that will be used to complete these objectives/assignments.
6. There must be assignments if you choose an objective.
7. Scroll down to the bottom and click 'assign'
8. This will open the records page. In the top left corner, choose *save*. If you're done, close the tab.
9. If you need to add more, you can choose the + sign.
10. Sometimes you have to choose the module.
    a. It will open to add/edit window
    b. Choose assign from curriculum
    c. Choose the additional assignments/objectives that need to be added.
    d. Add the assigned on date
    e. Choose assign
11. Repeat this process for each relevant curricula in each class.
12. You might not use each curriculum every time
    a. You might need to use a combination of textbooks and standards
    b. You might have a student working from multiple books

After the LP meeting

1. Review the AWRs for accuracy against the body of work. You may need to add or delete some objectives/standards and/or assignments to create an accurate record.
2. During your review, find the objective and assignment that matches your sample. It is helpful to think of the sample as a picture and the objective & assignment as its caption. **The auditor and your peer reviewer will look for this to match.**
3. This video will help you add/edit objectives and standards

Helpful videos:
Adding forgotten dates or adding objectives and assignments
Adding to an AWR

How to complete a custom comment in SIS:

This should not be a common practice used to create AWRs. Custom comments should only be used to refine the AWRs when clarity might be needed for the auditor. They should be written so that they connect and flow within the curriculum that is being used. They should not 'stick-out' in an obvious way.

1. Watch the following videos on how to write custom comments or add a comment(s) to standards.
    a. Adding Assignments (Custom Comments) to Standards
2. Custom comments should have:
    a. Objective/WHAT was learned: "Student will identify parts of a butterfly," "Student will observe butterflies in their natural habitat," "Student will learn about the jobs of an Ichthyologist," "Student will identify the plants eaten by Monarch Butterflies." "Student will observe butterfly collections from around the world." etc.
    b. Assignments/HOW it was learned: "Student will read a book." "Student will watch a video." "Student will study charts identifying butterfly parts." "Student will complete a worksheet." "Student will attend a field trip to the butterfly museum." "Student will complete an art project."

Loading Samples Into SIS

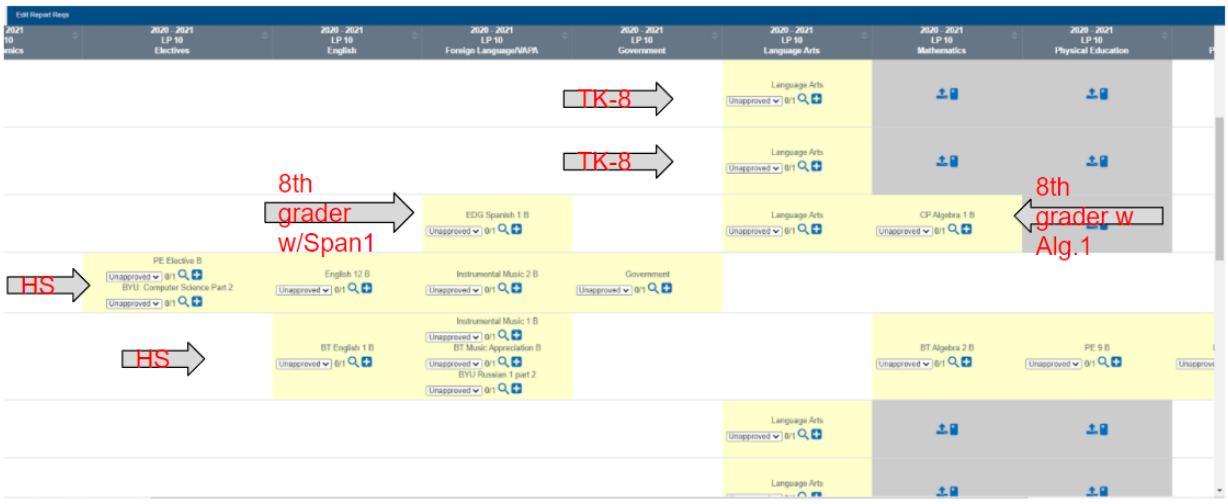
In addition to completing AWRs, teachers must also load samples into SIS. See the section "Sample Requirements " for more information about sample requirements, acceptable vs unacceptable samples and labeling.

1. Go to *Teachers* > *Compliance* > *Archive Compliance*
2. Make sure the following information is chosen:
    a. Report title: Work samples
    b. Include students "with or without Archived reports"
    c. Staff: your name

   d. Range: the correct LP
3. Choose “Generate Report” button
4. Watch this video on how to load samples:
5. You may load TK-8 samples in each section or load them as a single document into “Language Arts”. They must be in the following order: ELA, math science, social studies and PE
6. High school samples must be loaded into their individual classes.
7. Samples must be /jpeg or .pdf files.
8. Uploading options:

   a. Option #1: Upload from a computer or Google drive using the
   b. Option #2: Direct upload from your phone via text message: This works for single pages only.

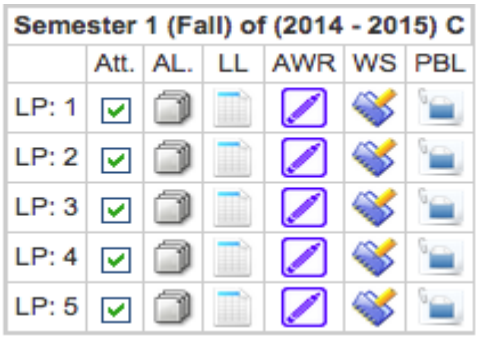
Sample Archive Compliance:
Below is a sample screenshot from Archive Compliance after samples have been uploaded. Please note that high school classes, including those for junior high school students, are loading into the individual classes. This helps HQT’s to check for their specific subject.



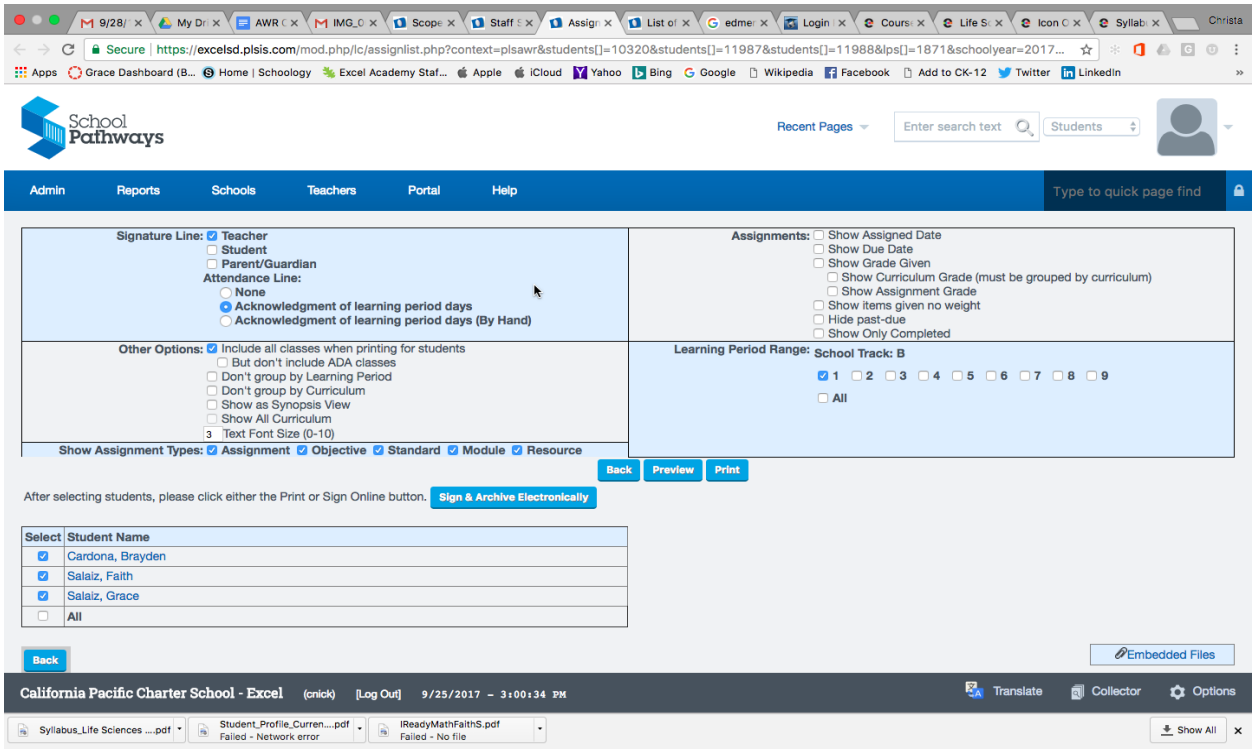
Archiving AWRS

After you have completed all of your AWR's for every student on your roster, you will archive the AWR's all at the same time. **This must be done AFTER you take attendance for your roster.**

1. Click on the AWR button for the appropriate LP on your roster home page. (see photo below).

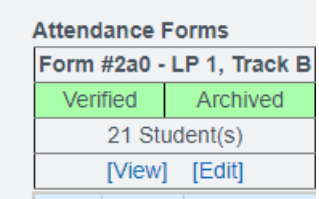


2. Click on 'Sign and Archive electronically'. Make sure the "teacher signature" box is clicked. Parents and students do NOT sign the AWR.



3. SIS will create a document version of your student's AWRs in alpha order. Scroll through all of your students and make sure that the AWR's are showing up for all subjects.
4. Sign each AWR with your signature and your typed name. Use the same date that you signed your attendance as the signature date.

a. Hint: You can use the 'Attendance Forms' section on your dashboard to see your signature date: Click 'view' to remind yourself of the date it was signed and archived.



5. At the top of the AWR you want to see the number of days the student was present. For example:
   a. "*The number of attendance days possible for this student's learning period is 19. In my professional judgment, the student has completed work that has a value of 19.*"
   b. You do not want to see the value '0' here. If you see '0' here that means you have not claimed attendance yet. AWRs are to be completed and archived after attendance has been claimed.
6. If you see the correct number of days, choose 'Send Invitations/Submit Agreement' in the bottom right corner after the last AWR.

Completion of Compliance

Grading for Students
w/ Little to No Assignments

Q: **Should the AWR show all objectives and assignments for each Learning Period?**
A: Yes. All objectives and assignments noted on the pacing guide should be noted on the AWR. Remember that AWRs are written in the future tense by showing what the student is planning to complete. The purpose is to establish the intended learning and workload for each student per LP. Ex: Student will complete lesson 6.

Q: **What if a student only completes a few of the total assignments?**
A: Place a custom note (see below).

Q: **Can the uploaded sample reflect a student's best work even if they are failing a course? (ex. Uploaded sample earned an "A" but the student earned an "F" in the course.)**
A: Yes, but ideally the sample should reflect the grade they have in the course. The lack of work completion as noted in the custom comments or low grades on their other assignments will also support the lower grade in the course. If the lower grade occurred because the student failed to

turn in assignments, the comment on the AWR should show less work was completed, indicating the purpose of lowering the grade.
Ex: “Student completed 2 out of 10 assignments.” ~which would be an “F”

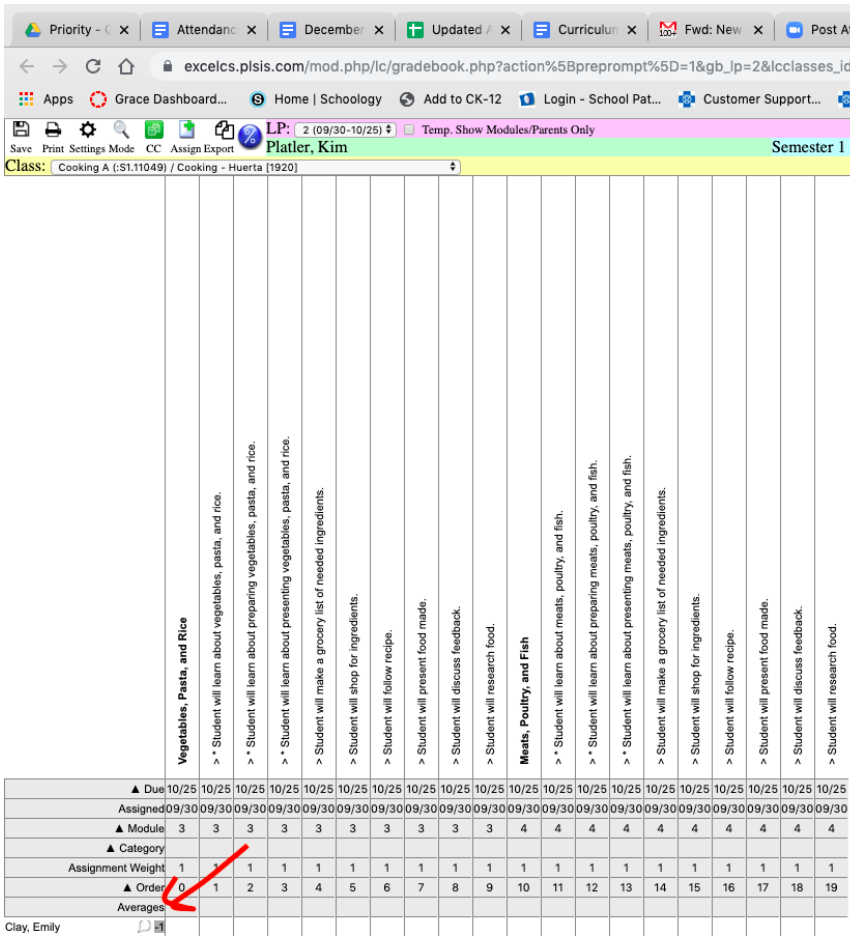
Q**: Should I note a lack of work completion on the report card?**
A: The report card should include a line about why the grade was lowered. Ex: Student only completed 20% of work, resulting in a lower grade and/or failing of the course.

How to Complete AWRs for Little to No Assignments Completed for the LP

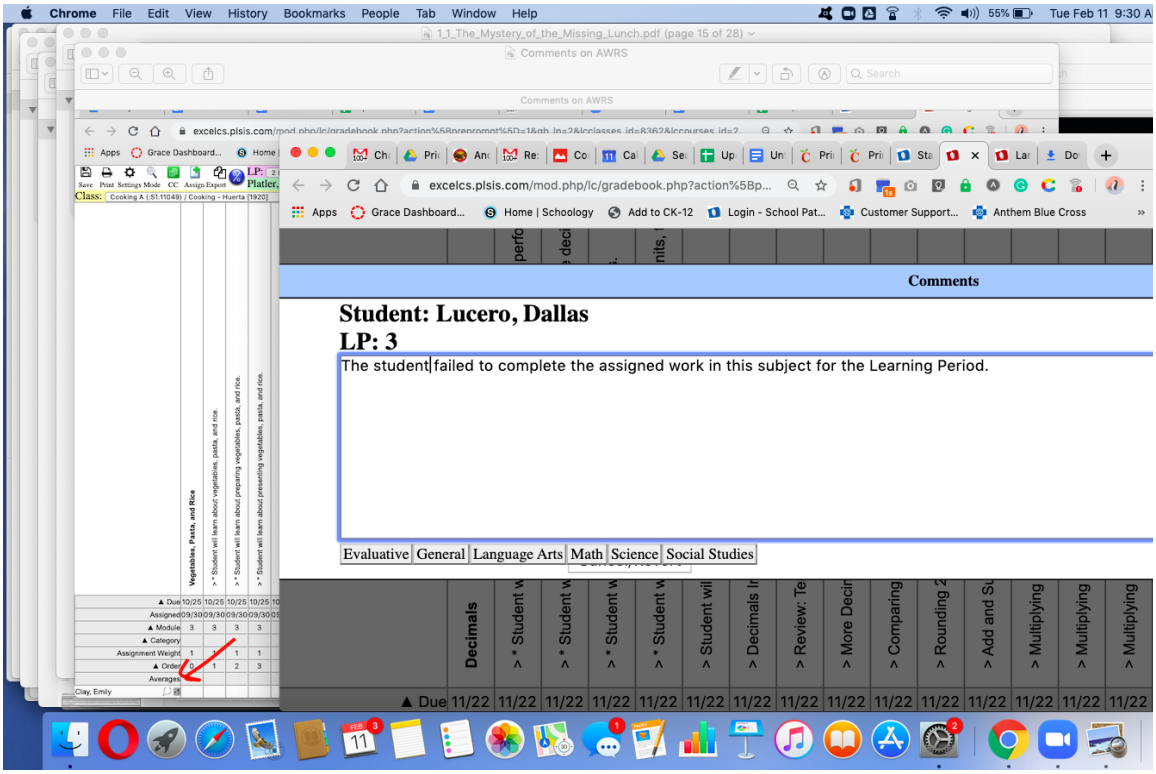
1. Choose assignments for your AWRs that represent the 20 days of learning the student SHOULD have completed for the LP.
2. Then, you will write a comment (see below for instructions) for each subject area affected that reads: "Student did not complete assigned work in this subject."

How to Include a Comment on AWRs:

1. While in the AWR for the class with no samples, click on the little speech bubble at the bottom of the assigned AWRs next to their name.



2. A box will open and you will type the comment in the box **for each subject that you received little to no work.** If you receive work in one subject, you will keep that AWR as normal.



ToR Roster Requests:

ToR will send **(admissions@excelacademy.education)** requests for the following:

1. Names of anticipated students you would like on your roster-*this is a request, not a guarantee*. (Follow Request Format previously sent out-ToR not to tell families they have room on roster)
2. Incoming siblings-Name and Grade level
3. Desired roster count (Admin approval required)

Custody Notes in SIS

At times there will be parents that share custody or have special custody arrangements that we need to know about. There are also times when parents have restricted custody arrangements (certain persons are not to be near the students.) For all of these situations, court papers must

be on file in the office. We cannot restrict a parent from their child unless we have this information.

If a student's parents are divorced, ask them about any custody arrangements they might have. If the parents have joint legal custody, we will need to have **both the father and mother sign the Master Agreement in SIS before archiving.** If you need to add a signature after, you can always do an addendum.

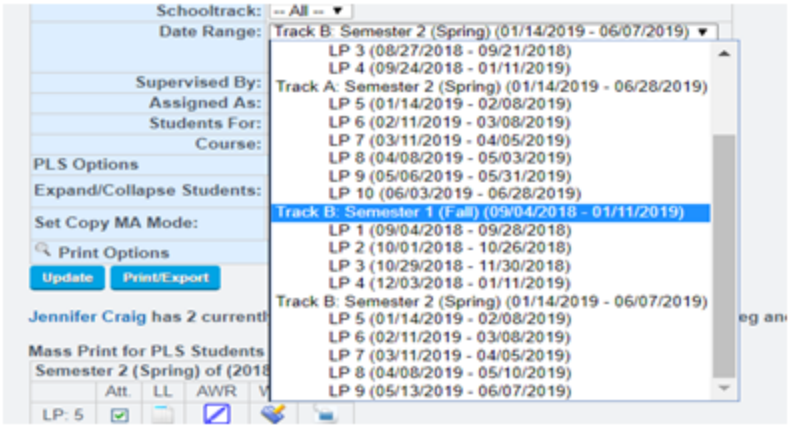
Go to the dashboard of the student.
This icon is where you will find all of the necessary information about custody arrangements:

*Please contact **the Registrar's office** (registrar@excelacademy.education) if you have any questions or need to make Excel aware of custody arrangements that are not in the system.

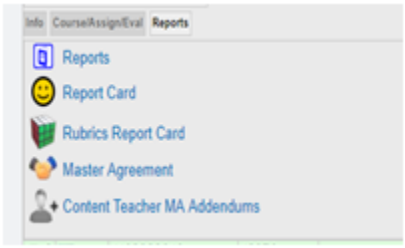
Report Cards in SIS

***Please refer to the shared report card folder for pertinent information and specific details.
At the end of each semester, ToRs will create electronic report cards in SIS for each student. *Grades TK-12 are required to have a report card.* This information can also be found in the shared drive under Assessments> Report Cards.

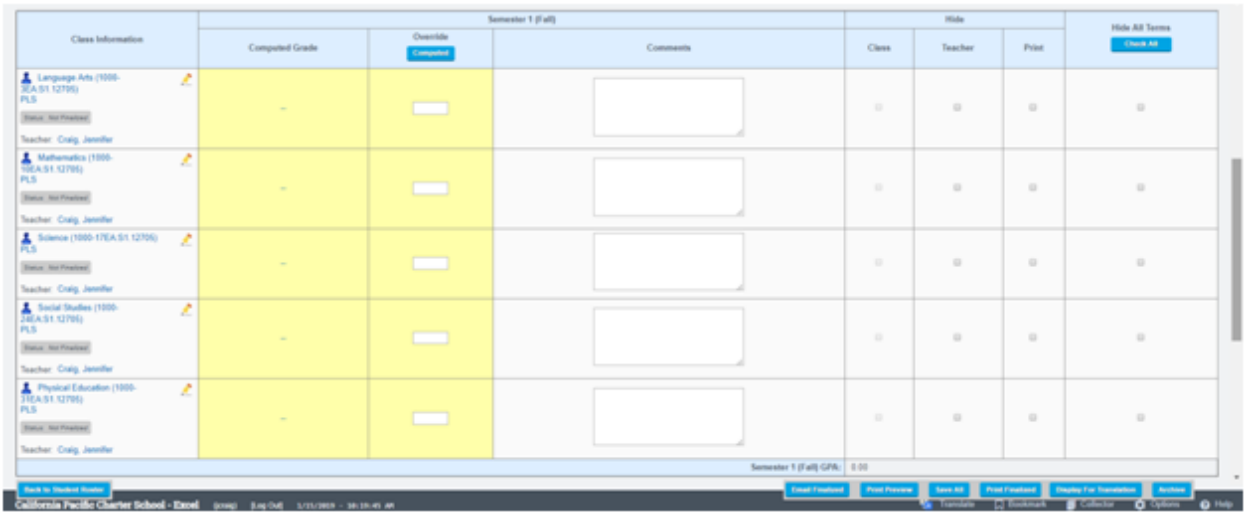
1. Login into the SIS
2. Go to your student roster
3. Use the drop down to find the Fall semester dates and click *Update* (Spring - find the semester two Spring dates and click *Update*.)



4. Next, click on *Reports* under the student's name, and from the list provided click *Report Card.*

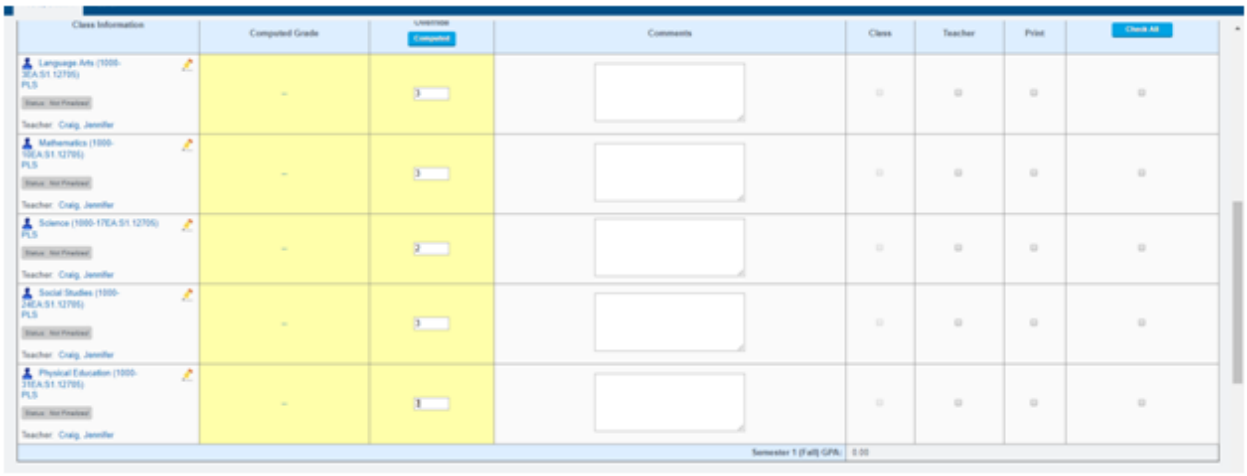


5. You will be directed to this screen (scroll down to see where you enter grades).

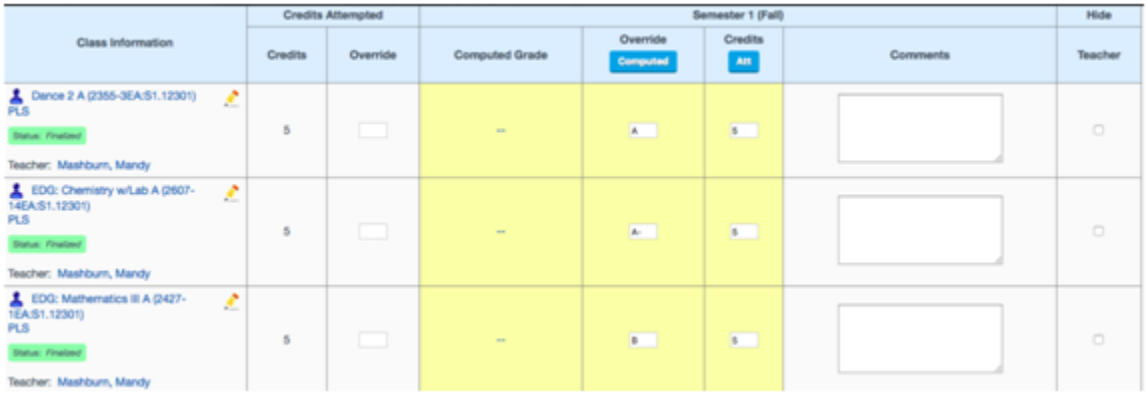


6. The above screenshot represents a TK-8 report card. ***You will NOT type in anything under the column titled *Computed Grade*. You will type in the grades under the column titled *Override Computed*.
7. TK-5 - Using the 4-1 scale, under the column *Override Computed* you will indicate the appropriate number (4, 3, 2, or 1) next to the designated subject.

8. Here is an example of the completed column with the appropriate grades.



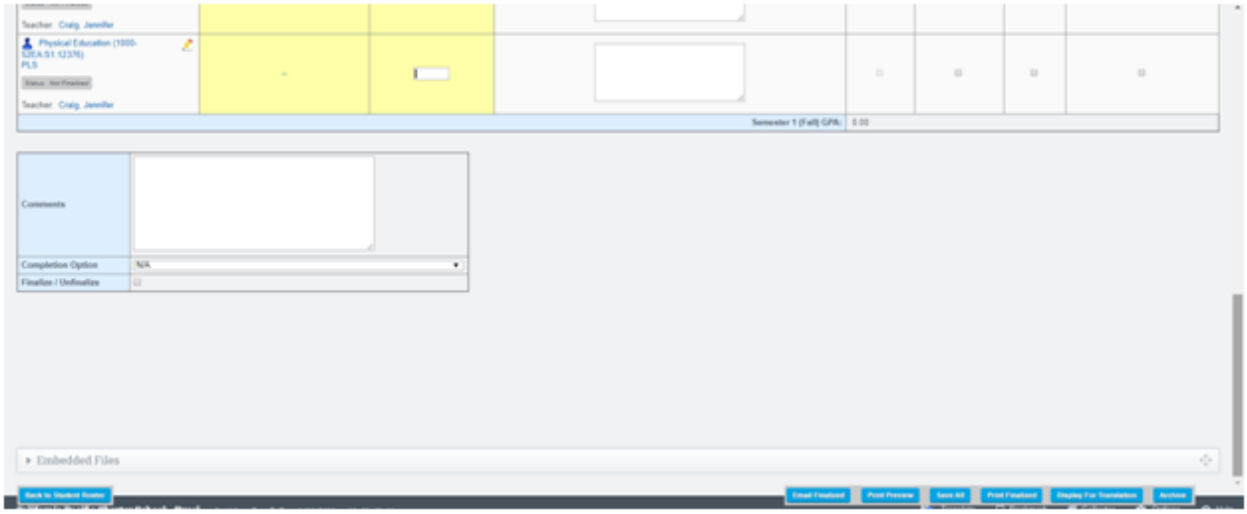
9. Grades 6-8 - Using the A-F scale, under the same column as above (*Override Computed*) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 6-8 will earn letter grades (not numbers).
10. Grades 9-12 - Using the A-F scale, under the same column as above (*Override Computed*) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 9-12 will also earn credits (5 per semester) which will be indicated in the *Credits* column. ***You will only type in the shaded yellow columns. Once you type the credits in the shaded yellow column, the credits will also appear in the white column titled Credits Attempted/Credits. Example:



Class Information	Credits Attempted		Semester 1 (Fall)				Hide
	Credits	Override	Computed Grade	Override Computed	Credits Att	Comments	Teacher
Dance 2 A (2355-3EA:S1.12301) PLS Teacher: Mashburn, Mandy	5		--	A	5		
EDG: Chemistry w/Lab A (2607-14EA:S1.12301) PLS Teacher: Mashburn, Mandy	5		--	A-	5		
EDG: Mathematics III A (2427-1EA:S1.12301) PLS Teacher: Mashburn, Mandy	5		--	B	5		

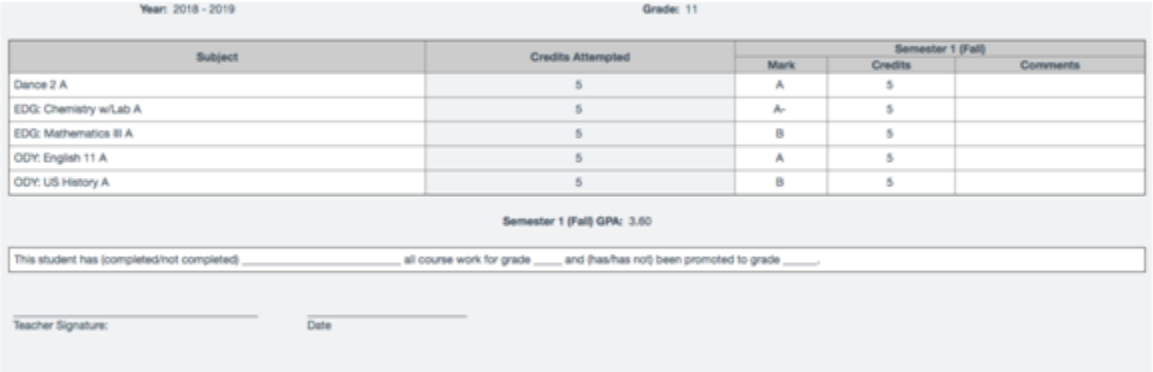
11. **Comments - Please refer to the report card folder.** Every student in grades TK - 12 should have at minimum one comment on the report card that has been chosen from the dropdown. Some students may have more than one depending on their progress in each subject. In the column titled Comments, you do not have to type any comments in line with the designated subject for your students in grades TK-12, **unless the student is performing below grade level as specified on the directions and FAQ documents in the shared Report Card Resource Folder. There is a specific example for 6-8 grade students. Please refer to the shared folder.**
12. If you had a student drop prior to the withdrawal deadline, simply hide the course; do not do an addendum. If your student withdrew after the deadline, remember to include the "W" or the "F" based on the withdrawal date.

13. ToRs will input "IP" for the grade of all concurrently enrolled courses and zero out the credit earned. Upon the receipt of the official transcript, the registrar will input the grade and credit earned and then email ToRs when complete. At this point ToRs can update the report card to reflect the college class grade if requested by the parent. However, once the registrar department inputs the grade and credit for college courses, then the parent can automatically see that reflected in their parent portal on the transcript view, thus updating the RC is not a necessity.
14. At the bottom of the report card, you will see another box titled *Comments*. For TK-5 students, please cut and paste the appropriate 4-1 grading scale.



15. ***IMPORTANT - DO NOT INDICATE SPED OR EL ANYWHERE ON THE REPORT CARD. Prior to creating a report card, please confirm with the Case Managers the grades of students with IEPs.
16. If you have questions about comments, please email Jenny Craig.
17. Please make sure to click *Save All* if you are not ready to finalize the report card, so you can come back to it at a later time.
18. **Click the box next to *Finalize* under the *Comments* box when you have completed the report card. The screen will become shaded.**
19. Then, click ***Save All.***
20. Click ***Archive*** to sign and date (always the last day of the semesters.) Once archived, you will be directed to a new screen and you will see a blue arrow to click to *view,* which will create a PDF to save and print to send to your student/parent via email.
21. Make a copy of each report card to bring to the office to be filed in student cumulative folders.

***Here is a sample copy of a completed report card (without the student's name, grade, SSID).



Year: 2018 - 2019 Grade: 11

Subject	Credits Attempted	Semester 1 (Fall)		
		Mark	Credits	Comments
Dance 2 A	5	A	5	
EDG: Chemistry w/Lab A	5	A-	5	
EDG: Mathematics III A	5	B	5	
ODY: English 11 A	5	A	5	
ODY: US History A	5	B	5	

Semester 1 (Fall) GPA: 3.60

This student has (completed/not completed) _____ all course work for grade ____ and (has/has not) been promoted to grade ____.

Teacher Signature: Date

***FALL - Do not complete the sentence regarding promotion
***SPRING - Complete the sentence indicating promotion to the next grade level. For example - This student has completed all course work for grade _____ and has been promoted to grade _____.
Please indicate the promotion status on the RCs for HS students as...
Student in 12th grade who graduated...
has promoted to completion of required credits towards a high school diploma

Student who will be completing a fifth year in HS...
has been promoted to a fifth year

Student who will earn a certificate of completion...
has been promoted to certificate of completion

TK-5 Scale for Comments Box

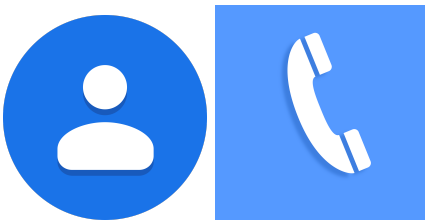
4: Exemplary – Above Grade Level
3: Proficient – At Grade Level
2: Approaching Proficiency
1: Non-proficient

Helpful Hints -

****SIS did an update and now the *archive* button needs to be clicked in order for the report cards to be officially archived.

****If you choose to print at another time, you can go into your *archive* through SIS to print the report cards. ***ToRs will be provided with a shared folder to drop in report cards and progress reports for Admissions to put in student cumes. ****Progress reports are printed and not

completed through SIS. Progress Reports are found in the shared Report Card Folder. MAKE A COPY FIRST AND KEEP THE BLANK ORIGINAL IN THE FOLDER FOR OTHERS TO USE.



Documentation within Contact Manager and Student Notes

Recording important interactions with your families is crucial to maintaining a professional record of each student's time at Excel Academy. While not every interaction will need to be recorded in the Student Information System (SIS), the following instances warrant documentation in the contact manager by the appropriate person(s).

Contact Manager

Documenting contact with your families and important student information is easy in the SIS. The first area this is possible is through Contact Manager, which will be used for the following:

- Documenting a Phone CallRescheduled LP Meetings or concerns
- Document meetings that are held and include the date: SST, IEP, Manifestation, etc.
- Any other type of "contact" with the family that was successful OR unsuccessful (meaning you talked with them or attempted to talk with them and left a message).

Examples:

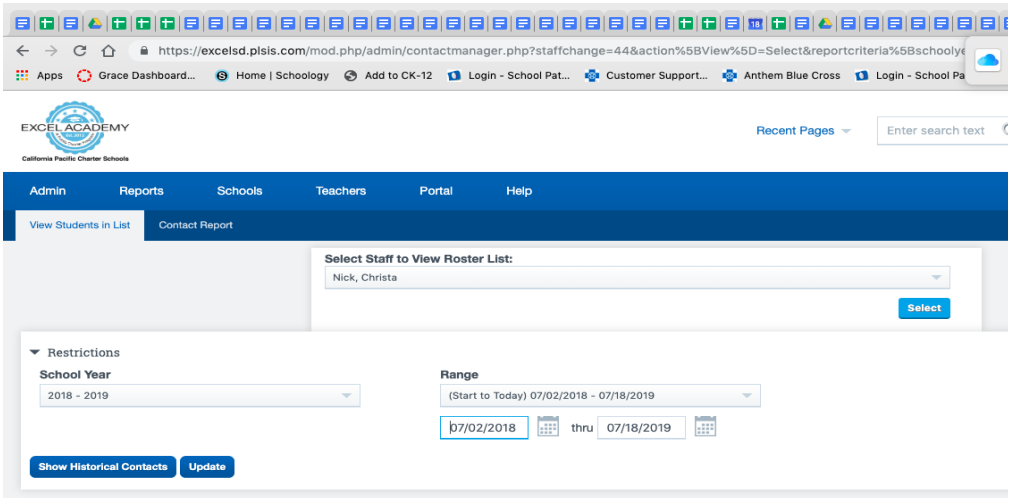
- You met with a parent outside of the usual LP meetings and helped them to navigate the curriculum; providing a pacing guide and suggestions for streamlining the work.
- A first meeting with a parent who is new to Excel Academy Charter School.
- Injury or Incident at a School Event/Field Trip (contact should be made with BOTH the parent and admin and you would document that you talked with both.)
- A conversation with a parent discussing a PIN or any conversations about opting-out of assessments.
- Dates SSTs took place with the SST Doc uploaded

To Access Contact Manager:

- **Go To "Teachers" Tab and scroll down to "Content Manager" and Select "Contact Manager" again in the menu.**

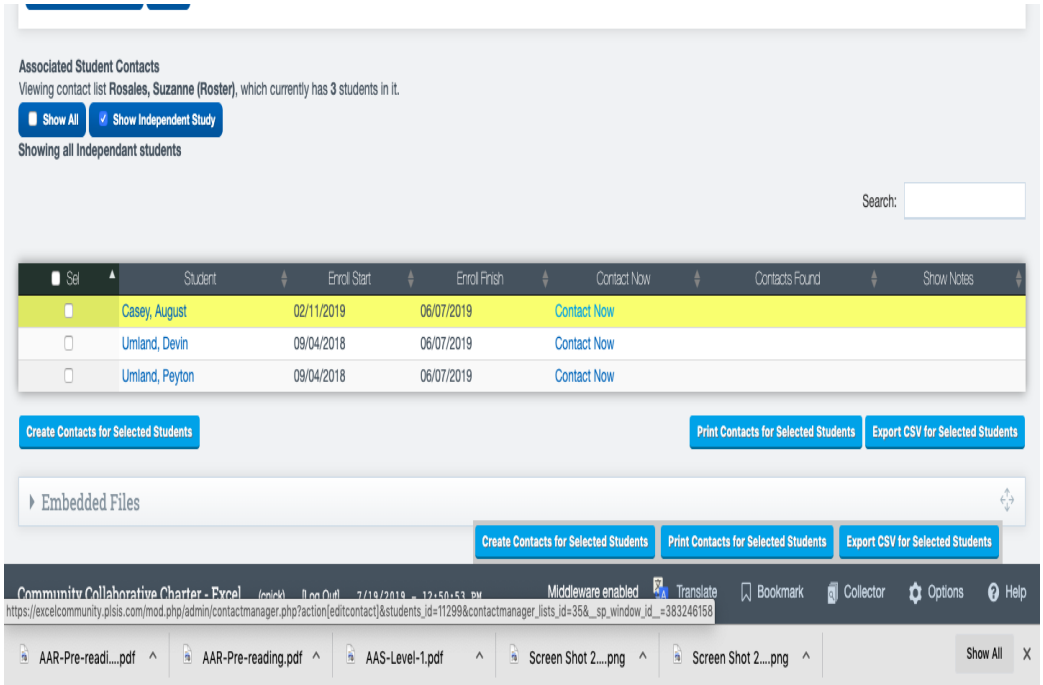
- ➢ You can also get to Contact Manager from the Home Screen and when on the student dashboard. Just look for the words "contact manager" and it will take you to the same place.

❖ **Then, you will get to a screen that looks like this:**

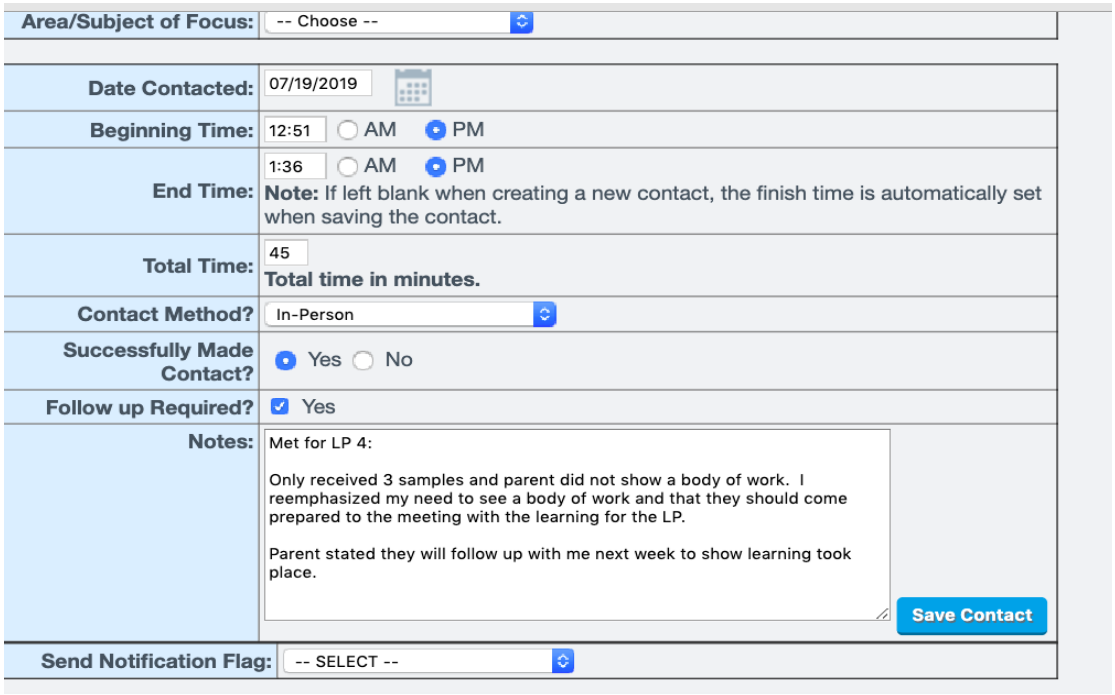


- ➢ Make sure the dates are set to the correct year and that your name is in the teacher spot at the top and then click "Update" in the lower, right-hand corner

❖ **You will see student names pop up at the bottom (scroll down), then select the student for whom you are creating a contact log for and click "contact now."**



- **On the Contact Information Page, you will fill out the portion with the date, time of contact in minutes, toggle the type of contact (in-person, phone, etc.), whether it was successful, etc. and put a description of what the contact was and if follow up is needed.**



- **Click "Save Contact"**

Student Notes Section:

The second area you will log information will be in the "Student Notes" section of the SIS. *This section will be used for things that need to be recorded, but are not necessarily interactions with the student or parent*. Some of the following reasons would qualify:

- Instances of Plagiarism (upload the plagiarized copy to the notes section; change to pdf if you have difficulty uploading)
- Behavioral Issues
-
- *CHYA opt-out letters from parents*
- *Important Information that Any Admin Should See When Logging in SIS (Parent Dislikes being on Video, Student Accelerated a grade on _____ (date), etc.*

If you go to the student dashboard (you can get to Student Notes by clicking on the student name anywhere in the SIS, including your roster page); then, scroll down to the *Student Notes* section of the dashboard.

First Steps with Assigned Families

Assigned Students: You will be assigned students both before school starts and throughout the school year. Before school starts, your roster will be in the Student Information System (SIS), for which you all should have logins. If the family does not have a login, please reach out to Keri Schneeweiss @ kschneeweiss@excelacademy.education. For students assigned ***after*** the school year begins, the admissions office will send you an email letting you know a student has been placed. Once you receive this email, please look carefully in the SIS for any pertinent information about the student, **including the receipt of transcripts for secondary students**. (See the SIS section for instructions on how to access student information.) Once the student is highlighted in **blue**, you may contact the parent. See the section on *Enrollment status and Additional Information* for an explanation of the different colors in SIS.

Transfer Students: At times it is necessary to transfer a student from one ToR to a new ToR. The process is similar to that of an assigned student, except, once the school year begins, you will complete an addendum to the original Master Agreement (MA) , rather than a completely new Master Agreement. For instructions on this process, please see the addendum video located in the "Training Materials and Manuals" folder of the Education folder.

Your Role as ToR: The ToR/family relationship is very important to most families. They are looking for someone who can be there to guide them, provide encouragement and work alongside them to ensure a successful academic year for their child(ren).

Please note: ToRs should *never* contact a student via email, phone, text, social media or any other messaging system *without the parent/guardian also being included in the correspondence*. Even then, prior permissions from the parent/guardian should be granted before including students in a conversation with you and the parent. **At no time should conversations between a ToR and student occur without the parent/guardian.**

- ***Initial Email:*** Send a welcome email to all new students before reaching out via telephone or Zoom. Even if it is the same day, it's less intimidating for the parent and more likely that they will answer the first time. In the introduction email, attach applicable documents of help. (ie. TK-8 Curriculum Handbook, school calendar, etc.)
    - If the parent replies, this is a great opportunity to set-up a Zoom meeting to discuss the curriculum. Let them know that the Zoom will be long (approximately 45 minutes).

- ***Initial Phone Call:*** This call is a **brief** time to confirm student details and ensure the family knows how our school functions. You can use this checklist to guide your phone call.

  - ➔ ***Ask the parent questions about their family and how they came to Excel Academy***. Ask them what their goal is for independent study (escape bullying in school, desire character building, improve academics, etc.). This will give you a feel for what is important to the family and how you can best approach them as a teacher.

  - ➔ ***Introduce yourself and your role as their Teacher of Record.*** Feel free to let them know a little about your family or hobbies, as well as your passions within education.

  - ➔ ***Confirm Name, Grade Level, Birthdate, Telephone Number, Address and Email*** of each student in the family. Each year we have students with incorrect information or the wrong grade level in the SIS! Also use this time to ask for alternative contact information (like additional phone # or email.) *Let the family know that we communicate primarily *via email* and that they should check it daily for important information from you. Let them know you will always email them back within 24 hours (1 business day) and they must respond to emails within 48 hours (2 business days.)

  - ➔ ***Ask the parent about any custody arrangements***. Say: "We want to make sure to respect any family arrangements that you may have, so if there are any custody arrangements or special concerns you wish for us to honor, please let me know. If your child(ren) splits their time between homes, that is completely fine, just let me know so I can include both parents' signatures on the Master Agreement and Acknowledgement of Responsibilities." *Refer to instructions in the SIS section of the manual for reporting legal custody arrangements to the Registrar's office: registrar@excelacademy.education.

  - ➔ ***Describe the role of the parent as the primary teacher for the student for Personalized Families.***
    - ◆ The day-to-day teaching and correction of learning assignments is completed by the parent/guardian. You will support them as the credentialed teacher, but you do not tutor the student in any way,
    - ◆ Parents/guardians must oversee student learning on a day to day basis, be responsible for all work completion and ensure all necessary student work learning is brought to the Learning Period (LP) meeting.
    - ◆ Instructional funds (IFs) can be used to purchase curriculum or classes, with the ToR having ultimate say over where funds are allocated if a child needs resources allocated differently to support their comprehensive Course of Study. Core curriculum **must** be in place before supplemental classes and curriculum are purchased. Religious material is not acceptable.
    - ◆ There will be daily teacher-student instruction offered and the parent must log their attendance daily.
    - ◆ Parents will provide samples monthly at a meeting with the ToR.

- ➔ ***Set up an in-person meeting or Zoom to discuss curriculum, courses and sign paperwork. This will need to be within the next few days.*** Please note: All Content and Community Provider classes must be ordered 10 business days before the student's first day of classes.
  - ➔ Let them know to bring any curriculum they already have on hand so that you can approve it and take a picture of the Table of Contents for each book for reference throughout the year.
  - ➔ *Have them think about their curriculum choice*s before they meet with you. Share the TK-8 Curriculum Menu and Handbook and High School Course Catalog with the parent ahead of time,.
  - ➔ Let them know that the meeting will last about one hour.

- ➔ ***End the phone call by asking if they have any questions.***

- ***Send a follow-up email***. Thank the parent for their time and send all of the resources, including free subscriptions, resources, etc. that were discussed on the phone.

Prospective Student Contact:

ToR will contact parents via email and phone to welcome the family to Excel Academy and to ask them for withdrawal date verification from their previous school. (Students in RED need withdrawal verification)

1. Phone and send follow up email to pending student(s) on your SIS roster.

The following are example emails for families assigned to your roster. Please use the appropriate emails based on the color students show up on the roster. Students in RED still need a withdrawal confirmation.

Student(s) Show RED in SIS

Hello _____ Family!
My name is _____, and I will be your Teacher of Record for this year. **Could you please give me a quick reply to this email so I know that you received it?** I will call <insert approximate time or date> to introduce myself. This will be a brief phone call to set up our intake meeting.

We are missing an important piece of information. Please provide an email verification from you or your previous school stating the last date your child(ren) were enrolled with that school. You can send this to me directly via email and I will make sure the admissions department receives the information. We cannot complete enrollment until we have this information.

For High School families include - Please be sure to send your child's academic records including an unofficial transcript and report cards to our Registrar - registrar@excelacademy.education.

I am excited to work with you and your child(ren). My job is to help you with all aspects of independent study. As your child's Teacher of Record, I will monitor their progress and collect their work samples throughout the year. To support you, I will help plan your curriculum, answer your education questions and manage your instructional funding.

During that first meeting, we will complete your enrollment by signing a Master Agreement/Acknowledgement of Responsibility and additional paperwork. We will also discuss curriculum choices, our program's structure and guidelines to begin planning for the school year. In the meantime, please feel free to browse through some of these resources:

*Excel Academy Website: I encourage you to read the school handbook and watch the video about your pathway.
*Excel Academy CCP list: this is a list of our current providers that accept education funds from our school

Documents Attached:

- School calendar
- Preparing for the school year: This is basic information to know before completing your enrollment.
- Curriculum Menus/Handbook
- Course of Study: Please use this to record your final curriculum choices.
- Parent Meeting LP checklist- This is basic information to help you understand our expectations for our learning period (LP) meeting, which are monthly.

My phone number is <insert phone number>. I look forward to speaking with you soon!

Student(s) Show BLUE in SIS

Hello _____ Family!
My name is _____, and I will be your Teacher of Record for this year. **Could you please give me a quick reply to this email so I know that you received it?** I will call <insert approximate time or date> to introduce myself. This will be a brief phone call to set up our intake meeting.

I am excited to work with you and your child(ren). My job is to help you with all aspects of independent study. As your child's teacher of record, I will monitor their progress and collect

their work samples throughout the year. To support you, I will help plan your curriculum, answer your education questions and manage your instructional funding.

During that first meeting, we will complete your enrollment by signing a Master Agreement/Acknowledgement of Responsibility and additional paperwork. We will also discuss curriculum choices, our program's structure and guidelines to begin planning for the school year. In the meantime, please feel free to browse through some of these resources:

*Excel Academy Website: I encourage you to read the school handbook and watch the video about your pathway.
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Documents Attached:

- School calendar
- Preparing for the School year: This is basic information to know before completing your enrollment.
- Curriculum Menus/Handbook
- Course of study: Please use this to record your final curriculum choices.
- Parent Meeting LP checklist- This is basic information to help you understand our expectations for our learning period (LP) meeting, which are monthly.

My phone number is <insert phone number>. I look forward to speaking with you soon!

1. ToR will attempt to make contact for 5 school days through phone calls and emails.
2. If there is no response from the parent after 5 school days-the ToR will send the following email with the appropriate student/family information.

No Parent Response After 5 Days

Hello Mr. and Mrs. _____

My name is _____ and I am a Teacher of Record with Excel Academy and have been assigned as your ToR.

I have attempted to contact you via phone and email several times during the last few days but have been unsuccessful in reaching you. I am eager to partner with you on your educational journey. However, if I do not hear from you within the next 2 calendar days, I will assume you are no longer interested in our school, and you will be placed on a waitlist with the Admissions Department.

Thank you,

(Excel Academy Signature)

1. Notify Salmeh Zahedi (admissions@excelacademy.education) and cc Nick Romo and the Registrar to let them know the newly assigned family has made no contact with you or is not interested in enrollment with Excel at this time.
2. Admissions will attempt to contact the family and/or place the student(s) back on student intake with a designation of previously placed (PP).

Personalized Pathway: Initial Meeting

The initial in-person or Zoom meeting is a time to go over the responsibilities of the parent and/or any changes in policies for the current school year for returning parents. You will introduce parents to the ordering system (OPS), Beehively, and the many resources available to them (TK-8 Curriculum Handbook, free school-wide subscriptions, etc.) If the parent/guardian understands and agrees with the policies set forth in the Master Agreement (MA) and AoR, they will sign them at this time.

This meeting may be in-person or virtual. With a shortened ordering time in August, Zoom and Google Meets are the virtual meeting platform options for reviewing important documents with families while still 'seeing' each other for the first time. New families may want to meet in person before committing to our school. Please work with each family to address their needs and comfort level.

Returning Students in August: Because policies and procedures change throughout the years, it is important that parents have the most up-to-date information. Please contact your returning families with updated procedures and any additional questions. **This is a yearly requirement with all families.** This allows parents to get essential updates for the school year. You might also consider having a webinar for all of the parents on your roster to discuss any new policies and procedures and answer questions.

Supplemental documents for this sections:

Initial Parent Meeting Checklist

Parent Checklist: Getting Ready for School

HS New Student Checklist

Hand Out the Following Documents/Email in advance if the meeting is virtual

1. **Excel School Calendar**- 2023-24 School Calendar (Print in Color) available on the website or in EACS Handbook as well
2. **CCP Acknowledgement:** This is signed by families in RegOnline, but if your returning students are unable to log back into their RegOnline account, feel free to email it to them.
3. **Acknowledgement of Responsibilities (AoR)**: see section below
4. **Course of Study template for information gathering:** Shared Drive> Education folder > ToR Resources

a. You will add this information to the Course of Study Elementary Doc or the Course of Study Secondary Doc spreadsheet for review by your Regional Leader.

5. **Course Content:** *(may be shown on your screen if virtual)* Print course content for approved HS courses and TK-8 curriculum from SIS by clicking "view" and scrolling to the bottom to "print"

6.

Topics to Cover During the Meeting:

1. Acknowledgment of Responsibilities and Master Agreement

- Place the Acknowledgement of Responsibilities in front of you and go through it line by line with the parent. (located in SIS, along with the MA.)
  - This is absolutely crucial, as many parents get to a point in the semester where they are issued Progress Improvement Notifications (PINs) because they did not understand the policies set forth in our Acknowledgement of Responsibilities.
  - Review with families any new and relevant changes to our program.
- Explain policy changes for this school year that will directly affect parents, especially veteran parents.
- Have the parent sign the Master Agreement/Acknowledgement of Responsibilities for each child if it was not signed in the spring)
  - **For HS students,** you may need more time to discuss and add courses. A generic MA can be signed. Please refer to the HS New Student Checklist for onboarding information for HS students and ways to create a generic grade level HS MA
  - Confirm the student information in SIS for accuracy (name, grade level, birthdate, telephone number, address and email).
    - For inaccuracies,please email **admissions@excelacademy.education with the** corrections that need to be made. Email subject line: *SIS Corrections*
    - If the student grade level is wrong, you can have them sign an addendum later to correct this inaccuracy on the MA.

2. CCP Agreement (CCPA)

- Go through this document thoroughly with your families, so they understand how funds work. Some of the most important items are:
  - Non-consumable items are the property of the school and must be returned.
  - Content and Community Providers (CCPs) may not have room in their classes. Parents/guardians must contact the CCP first to see if there is room for the student and ask that their place be held. ***Excel Academy does not pay registration fees.***
  - CCP class orders must be received by the ToR *10 working days* before the first day of school. Teachers can enter the orders 7 days prior to the start of a course.
  - Materials will be shipped to parents as a default. Confirm this option and shipping address with them. In unique circumstances, some orders may need to come to you.

3. Curricula (Course of Study)

- Discuss curriculum options with the parent. If the parent does not know where to begin,

you may suggest the TK-12 Curriculum Menu. If the family does not find a curriculum through the menu, they may use the TK-8 Handbook/High School CourseCatalog. **Students must have curriculum content and a pacing guide in place for each core course before the start of school.

- Fill out the Course of Study Elementary Doc or the Course of Study Secondary Doc with the parent, explaining areas that need another curriculum to fill in the gaps. Make sure to write down everything the student is using for curricula and check for gaps in learning (spelling, reading literature, writing). Families might need a few days to make final decisions.
- Parents/guardians must choose complete curricula, for all courses, **within 5 days of signing the Master Agreement if school has already begun.** ToRs must order curricula for the student if a full week has gone by and the parent still has not chosen a Course of Study.
- For those that have curricula in hand that they would like to use, take a picture of the Table of Contents for each course. You will need this to ensure it hits all standards and for pacing purposes/AWRs.

4. Pacing Guide

- *The ToR must complete a Pacing Guide for all core subjects* a student is taking. Explain to the parent their responsibility for following the pacing guide on a weekly basis.
  - Pacing guide *templates* can be found in the Shared Drive under Education and Curriculum.
  - ToRs may also send copies of the pre-loaded AWRs to families as pacing guides.
  - Families must receive their pacing guides before the first day of the learning period.
  - Help parents to understand what a *'body of work'* is.

5. Recording Student Learning

- Explain the options for parents to record student learning in preparation for the LP meeting each month.
- Parents should bring a copy of the Pacing Guide to each LP meeting, in order to reference the material the student completed. The ToR may need to adjust the Pacing Guide each LP for the parent/guardian and provide them with an updated copy.
- Tier System should be embedded here.

6. **Ordering:** Parents must have an academic plan and all necessary curricula ordered before the ToR can order supplemental courses (PE, art, field trips, etc.)

7. **Graduation Goals: (8th grade and up):** ToR must communicate that our goal is to have students graduate and meet graduation requirements. If students are wanting to attend a UC/CSU school, they must meet with our high school guidance staff *as soon as possible* to plan out a-g courses. However, ultimately, the PARENT is responsible for contacting colleges of interest to clarify specific admission requirements. Use the generic HS MAs as a guideline for common courses by grade level.

8. **Start Date:** Inform the parent that a student's start date on the master agreement is the beginning of academic learning. It will be either the first day of school, or the date in which the family signs the Master Agreement (after school begins). Families must log academic progress for each subject/course from that point on (even if they start

supplemental CCP classes at a later date.)
    - Please note: If a family wishes to start on a date later than their signature date on the MA, please contact **Noel Park in Admissions** and she will adjust the date in school pathways. The MA does ***not*** need to be redone.

9. **LP meeting location/time**: This must be a public location; no home visits are allowed for liability reasons. M*ake sure your LP meeting schedule is established and set before the first day of school*. All LP meetings must be held during work days (M-F) and work hours (8:30am-4:30pm)

    - **Read the section below on LP Meeting Scheduling before establishing your schedule. Elementary and Secondary pathways have different requirements.**

LP Meeting Scheduling

Please note: **At no time should families see the names of the other families you are meeting with on a shared schedule. It is easy to create confidential Calendar Sign Ups in Google Calendar for your LP meetings. See the following video tutorial for instructions!*

1. **LP Week:** Reserve the last week of the LP for your meetings. *If an LP ends on Friday the 5th, meetings should be held the 1-4th or the previous week* Refer to the *Excel 23/24 School Calendar* for school year LP dates. Reserve the Friday of LP week for make-up meetings and taking attendance.
2. **Elementary Pathway- alternating virtual and in-person meetings:** Beginning in 2022-23, ToRs are allowed to alternate LP meetings in-person or virtually on a rotating schedule.
    - Half of a roster *may* be seen virtually, while the other half **must** be seen in person.
    - The following month, ToRs must alternate those families to have in-person meetings with families that were virtual the LP prior.
    - *Recommendation*: Maintain the same schedule for both virtual and in-person meetings to avoid confusion.
3. **Secondary Pathway- mostly virtual**
    - Must complete one in-person LP meeting in the first semester (new families in the first three LP meetings)
4. **Locations:** Pick locations central to your families, doing your best to never make a family drive over 15-20 minutes except in special circumstances that the parent has agreed to ahead of time. Pick a location with ample seating and internet access if you want to work in between meetings. Keep families of small children in mind; the children might squirm and make noise.
5. **Duration:** Meetings should be scheduled at least one hour apart for single students in order to make time for a 45 minute meeting. If there are multiple students in a family, schedule an additional 30-45 mins for each student, depending on grade level. High

School students may take even more time. It is always better to allow more time than to run out of time.

6. **Mandatory:** Stress the importance that LP meetings ***cannot be rescheduled*** unless there is an *unavoidable* emergency. A doctor's appointment is not a valid excuse, as they should work appointments around monthly meetings. Be kind, yet firm, setting the tone the first time you meet with the family. If a family arrives late, cancels or misses meetings, refer them to the policies in the EACS Handbook. If a family misses their meeting or fails to turn in work, a PIN may be necessary. Give the parent until the attendance deadline for each LP and, if they still have not met with you and/or provided samples, reach out to Nick Romo (TK-8) or Lorrie Wood (high school) for a possible PIN.

The Scheduling Email:

(*All emails to families should be* ***bcc'd*** so families cannot see one another's email addresses.)

- Create a Google Calendar appointment invite, with time slots for parents to sign up their children for an LP meeting. Give a cushion of 10-15 minutes between families to allow for transition time.
- Ensure that you have included the meeting location in the sign-ups. For COVID, we will be virtual and you can utilize Google Meet/Hangouts or Zoom invite links in your calendar appointments.

Make sure your email is friendly, and includes:

- An explanation of what an LP meeting is
- The link to the calendar sign ups
- A reminder that LP Meetings are **mandatory and cannot be rescheduled,** unless there is an unforeseen emergency
- Both the student(s) AND parent(s) are required to be at all LP meetings, no exceptions.
- Students must arrive on time for scheduled time-slots, or risk having it rescheduled.
- Meetings will last approximately 45 minutes per student, depending on grade level.
    - Families with a high school student should expect to give an entire 45-60 minutes for the high school student plus the amount of time needed for any remaining TK-8 siblings.

Progress Monitoring

The primary responsibility of the Teacher of Record is progress monitoring. This comes in many forms:

- Weekly check-ins
- Weekly monitoring of grid logs to document engagement
- Regular and timely communication with families
- Monitoring online classes
- Learning period meetings (monthly or as needed)
    - Goal-setting
    - Monitoring completion of work outlined by the pacing guide
    - Measuring student academic growth
- Assigning additional work if needed
- Monitoring IEP goals
- Using SSTs to address academic issues

Engagement and Re-Engagement Programs and Policies (AB130/Ed Code 51747)

Recent changes to Ed Code 51747 through AB130, added July, 2021, require independent study programs to outline, offer, engage and re-engage students in synchronous instruction and live interaction. These guidelines and Excel's program adaptations to meet these guidelines are listed below. This new legislation has made programming fluid and may change as needed.

Tiered Engagement

Excel has adopted a tiered re-engagement strategy, which is outlined in the Acknowledgement of Responsibilities signed as part of the Master Agreement. Students must engage in educational activities on a daily basis.

ToR steps for monitoring engagement:

1. Parents are required to mark daily engagement on the student's grid log, which will be reviewed by the ToR at the end of each LP.
2. If proof of work cannot be provided, the ToR will begin the PIN process.

Synchronous Instruction and Live Interaction

Personalized Pathway ToRs are required to participate in Excel's programming for synchronous instruction and live interaction.

Excel's Programming:

Elementary & Secondary:

Monday through Friday: Virtual**,** daily engagement via Zoom for 30 minutes daily

- Students will be provided with extracurricular opportunities with one day of the week being designated for SEL
- Students will be broken into grade level bands.

Learning Period Meetings

Learning Period (LP) meetings are required every 20 school days by the State of California and are scheduled by the ToR based on the end date of Learning Period (LP). Generally, meetings occur the week an LP ends, but may be held earlier if needed. All meetings should take place before the last day of the learning period. That way, if there is an emergency, there is a chance to reschedule and take attendance before the deadline. **(Please note: You are required to have all samples in-hand before taking attendance.)**

REQUIREMENT: New teachers are required to observe one learning record meeting of their regional leader *before they meet with their families for LP1*. These observations will be scheduled the week prior to LP1 meeting week. The ToR Trainer will then schedule a time to observe the new teachers during their first two learning period meetings.

Each student's curriculum is paced out by the ToR for the school year, with clear expectations for what the student is to complete each Learning Period (LP). The ToR, parent/guardian, and student will meet together to review the student's body of work and academic progress at the end of each LP. 7th-12th grade students meet with their ToR monthly for their LP meeting. These meetings may be in person or online. Students and families must meet with their ToR once each semester in person, in the fall and in the spring. This in-person meeting requirement may be met during a Learning Period meeting, a field trip, or a school event.

Supplemental documents for this section:

LP Meeting Checklist

Parent LP Meeting Checklist

Work Sample Checklist

Forms for LP Meetings folder

Purpose of the LP meeting

The purpose is to oversee and assess student attendance and student progress towards subject mastery by reviewing the body of work. This can be a very rewarding part of the ToR position. It is a time to encourage students in their learning and offer parent support. Students and parents may start out very insecure, especially if they are new to independent study, so lots of encouragement may be needed. This is a time to reassure them that they CAN do this! Training parents in what is expected may take several LP's. However, when parents are trained well and follow expectations, you will have meaningful and productive meetings.

What does a meeting look like?

The order of a meeting is flexible, but should include these components:

1. Announcements/scheduling/pressing matters
2. Review of samples for each child
3. Collect samples from every category (ELA, math, sci, ss and PE)
4. Parent mentoring

Objectives during a meeting

1. Review work to assess learning for participation, attendance and mastery
2. Record the work that was completed so you know what to put in the Assignment and Work Record (AWRs)
3. Collect samples to upload into SIS for compliance to match AWRS
4. Assist parents in planning, pacing and troubleshooting

Objective #1: Work Review to Assess Learning

As a ToR, one way to assess student learning occurs during Learning Period meetings. Participating in student centered discussions, *based on the student's complete body of work* is a great way to connect with students and find out if they understand the material. Beforehand, ensure you communicate with your families the need to bring a *body of work* from each subject, not just a sample.

- Each student should take 30-45 minutes to review:
  - Take charge of the questions; don't let parent guide the conversation.
  - When possible, allow the meeting to be student-led to promote student advocacy.
  - Allow students to use their notes and samples to answer questions. It's not a test-- it's a conversation.
  - Try to review students separately or require they answer separately.
  - Use samples as a starting point for discussing and assessing mastery.

As students review their work with you, ask meaningful open-ended questions that include a variety of Bloom's Taxonomy and critical thinking. Remain friendly and down-to-earth to build strong relationships. Don't unnecessarily quiz students or put them on the spot, but work towards assessing their knowledge in a variety of ways. You can work on math problems, listen to them spell or read and have them explain concepts based on their work from the month. The types of questions below can be helpful. (Please see *Questions to Check for Understanding Doc*).

- *I see you learned about butterflies! Were you able to see real butterflies? Did you read a book about butterflies? Did you color any pictures or do a project?*
- *What steps did you take to create this final draft/project?*
- *What was the most interesting fact you learned about _____?*
- *What are you reading at home? Tell me about your favorite character…*
- *What do you think will happen next in the story?*

***It may take a couple of meetings to break the ice with some new students, but hang in there!*

Assessing Learning in a Virtual Meeting:
During virtual meetings, ToRs should maintain high standards for assessing work. Students must still provide a body of work and should have their workbooks and papers with them. ToRs may need to use creative methods and leverage technology to assess student learning in a virtual setting. See the Virtual LP Meetings and Training Resources folder.

Objective #2: Recording Learning for the LP:

Parents need to communicate the monthly learning that takes place for their student(s). They may use reflection logs, learning logs or pacing guides to do this.

While a pacing guide should be in place before the LP begins, at times students complete slightly more or less than what was planned. The easiest way to communicate the learning from the LP (about 20 school days) is to print out a pdf of the curriculum from SIS and have the family check off the completed assignments. To retrieve the pdf from SIS, follow these instructions:

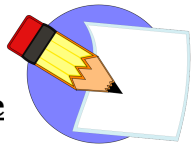
1. Go to your roster PLS/Student Roster.
2. Scroll down to the student and expand the blue arrow on the left.
3. Click on the green dot next to the subject you would like to open.
4. For the curriculum entered for that subject, click on the "view" button to the right of the curriculum title. (This will open up a pdf that you can then save and print.)
5. Repeat this for each subject for each student. Talk and add notes to grasp a full picture of learning that took place for the LP.

For curriculum that is NOT in SIS, parents can communicate learning with a reflection log, learning log or by referring to the table of contents:

1.

1. The **Pacing guide** is used to monitor the progress of a student each LP. The pacing guide ensures that the student is making adequate progress and completing the yearly requirement for each core subject. It is required for the ToR to communicate with the family on a weekly basis and make adjustments if necessary.
2. The **Learning Log** is found in the Parent portal and can be used to record completed work
3. **Table of Contents:** Teachers can refer to the Table of Contents for that curriculum and take notes as you talk to the student. (Take a picture or Obtain a copy at the beginning of the year.)

Objective #3: Collecting Samples to Upload into SIS for Compliance



During the Personalized Path learning period meeting, your goal is to take a variety of samples from the body of work. You can take paper copies or digital copies. Always take more than you'll need.

- Take lots of pictures with CamScan
- Have parents send them to you in advance if it's a virtual meeting

TK - 8th: Review the entire body of work and and collect several graded work samples for each core subject listed on the MA:

- Language Arts
- Math
- Social Science/History
- Science
- PE: Students may complete a PE Log or assignment, such as:
  - **TK-2** A picture with a simple written description by a student or dictated and written by the parent/ToR.
  - **Grades 3-5**: A picture with 3-5 sentences of their PE activities related to the picture.
  - **Grades 6-8**: A paragraph or two about their PE activities

High School: Review the entire body of work and collect multiple graded work samples for each course title listed on the Master Agreement. High school students must be enrolled in a minimum of five courses per their approved four-year plan (see High School section).

Objective #4: Assist parents in planning, pacing and troubleshooting

- Leave time to answer parent questions about curriculum, lessons and goals
- Briefly review the next month's goals/pacing

- Don't be afraid to ask for more samples, better quality, or assignments that cover missing standards/objectives
- Ask them how you can help during the next LP
- Remind them that you'll be checking in weekly and that you need a response within 24 hours.
- Remind them about daily attendance

Sample Requirements

As Teachers of Record, the student's *complete body of work* allows us to assess student learning and provide feedback to the parent/guardian. In addition to examining the body of work for the LP, teachers will also be required to **pull a sample from each content area** to upload into the student records system. These samples must contain the following:

1. Samples must be graded/marked:

a) Grades (6-12) Please include a letter grade, percentage, or fraction (all are okay) that indicates how well a student did on the assignment. If the student misses several questions on the assignment, but the page that is uploaded is free from error, it is advised to please write "page 1 of____," at the top so that it is understood the missed questions occurred on the pages not included. (Stickers, stars, checks, etc.. are not acceptable substitutes for a letter grade.) *

b) Writing Samples: The sample should have comments and corrections throughout the piece, along with a letter grade from the parent/teacher, showing they have read through it and provided feedback to the student. High school writing samples earning an A should include a corresponding rubric.

c) Grades (TK-5): Stickers, stars, checks or comments are acceptable forms of grading. A letter grade is NOT required. However, for math, students should show their work and wrong answers should be clearly marked. Ideally you will include the amount incorrect at the top of the paper, but again not necessary. (ie. -4 or 6/10)

*When labeling a sample digitally, please make sure the font and color is distinctly different from the font of the sample. This avoids confusion for the auditor.

2. Samples must show *as much student work as possible:*

a) Acceptable Samples:
   i) A picture of a science lab, accompanied by a lab write-up, detailing what the student learned.
   ii) Math homework in which all the student computations are shown (not just answers).

b) Unacceptable Samples:
   i) A photograph of the student completing a lab with NO write-up
   ii) Multiple choice or T/F exams or worksheets
   iii) Maps or coloring pages *not* accompanied by a brief description;
   iv) Math homework which shows only the answers.

c) For very young students (TK and K), the parent may write what the child dictates. Have them use quotation marks to indicate it was a dictation. *Once the student is able, they should be encouraged to write independently.*

3. **Samples must be <u>nonsectarian (no religious content)</u>** - please double check the content, as well as the publisher at the bottom of the page.

4. **Samples should represent the student's work for that Learning Period.** The ToR, along with the student and parent should select something that truly reflects the student's abilities.

a) *<u>Equally important is showing a progression of work.</u>* For example, a 1st grade student may start with copy work samples and by the end of the year be writing original paragraphs.

b) Do not accept <u>the same type of sample each Learning Period</u>. For example, language arts includes writing, reading comprehension, spelling, etc. Do not upload a spelling test for each Learning Period sample.

c) A student's BEST work does not necessarily mean it will be an "A" on every paper. Get to know your students and what they are capable of and educate parents that an "A" is above grade level work.

5. **Samples should represent the <u>student's original work</u>** and may not be plagiarized in any way. (Please refer to the Plagiarism section of the Student/Parent Handbook for more information.)

Withdrawal Process

(During the School Year-First Day of School Until Last Day)

<u>Summer Months:</u> No withdrawal form is needed for students that decide not to enroll during the **<u>summer</u>** months Excel is not in school.

<u>Simply notify:</u>

1. **Registrar**: Previously enrolled students
2. **Admissions:** New Students with No Previous Enrollment

<u>Withdrawals During School Year:</u>

Meet with the parent one last time, if possible, to collect:

1. Withdrawal Form: Have the parent sign the withdrawal form that is located in the shared drive. Or, click the link here.
2. Collect non-consumable books and computers purchased with Excel student funds.
    a. If parents refuse to return items or they are not responding to your requests, please send a list of the items not returned to the Registrar's Office. She will follow up with the family to obtain the items.
    b. Cancel any outstanding orders in OPS.
3. Attendance Roll (Grid) Log:
    a. Send the parent the attendance grid log to sign **with only the dates that the student was actively enrolled checked off**. The last day checked off should be the date of the withdrawal.
    b. You can also print the grid log if the parent is meeting with you and wishes to sign it in person. The signature date on the Grid Log will be the date of the withdrawal or after (typically within one week if you are meeting in person).
4. Collect Work Samples for the days enrolled during the LP:
    a. Reach out to April Saade (TK-6) or Lorrie Wood (7-12) and Registrar if you are unable to take full attendance.

Parent-Teacher Conferences (Virtual Path)

Virtual ToRs will hold parent-teacher conferences twice per year. These conferences will serve to facilitate a more in-depth discussion with the parent about the student's academic progress and the learning going on in the classroom. It is important to note that regular communication should occur with the parent outside of these two conferences. Parents should receive some type of weekly communication from their student's Virtual ToR. Should concerns about a student or situation involving a student arise, a telephone call or video call should be made to the parent/guardian.

Discipline - PINs and BIPs

Progress Improvement Notifications (PINs)

Excel Academy aims to partner with families to create a positive atmosphere in which mutual trust is built between the ToR and parent. In order to achieve this, it is crucial that teachers explain policies and expectations *thoroughly* with parents at the beginning of each school year. Most families will only need this one explanation to smoothly navigate through the rest of the year without a problem. However, some families will fall short of fulfilling Excel Academy Charter School policies and expectations. For those families, we have set up our Progress Improvement Notification (PIN) system, which works to inform parents of their failure to follow policy. Hopefully, this will correct the behavior and show that we have done our due diligence of identifying needed improvement and informing the parent.

Excel Academy has procedures in place to address violation(s) of school policies and student discipline when it comes to academic progress and behavior issues. These processes are categorized as Progress Improvement Notification (PIN) or a Behavior Improvement Plan (BIP) and detail how Excel Academy addresses a variety of respective infractions.

How Do I Know When to PIN?

Students can earn a PIN anytime they or the parent fail to comply with responsibilities outlined in the EACS Handbook, Acknowledgement of Responsibilities, and/or Master Agreement. During the first LP, it is important for ToRs to issue immediate PINs for families who do not make contact, miss a meeting, or fail to check-in. A ToR may follow a three-day time period. Beginning LP 2 when a ToR notices a student or family falling behind, they should immediately email the family and identify the issue along with a one-week time period to make adjustments. If the family fails to comply by the deadline, then a PIN should be issued. If you feel that a parent or student has failed to comply with Excel Academy expectations and policies, please contact April Saade (Elementary Principal) for TK-6th or Lorrie Wood (Secondary Principal) for junior high and high school students *before issuing or threatening a PIN*.

Some of the most common times PINs are issued:

1. Lack of work completion or failure to show work completion.
2. Failure to attend a learning period meeting or other mandatory school meeting.

3. Lack of communication for more than 5 school days, despite attempts at contact by phone and email.
4. Late cancellation of a meeting or cancellation of more than two required school meetings for non emergency reasons.
5. Failure to complete required WIN and/or ELD assignments.

Weekly Check-Ins and PINs

ToRs will conduct weekly check-ins and will monitor student progress.

Prior to submitting a PIN, all ToRs are responsible to reference the Levels of Support to guide students through areas of concern. Issuing a PIN requires evidence that the ToR utilized the Levels of Support to get the student/family back on track.
Levels of Support

Attendance

In our non-classroom based model, attendance is calculated two ways via work progress and daily engagement. Daily engagement is recorded daily in School Pathways. Please Note: If you are unable to take full attendance for any reason, *please contact April Saade (Elementary Principal) or Lorrie Wood (Secondary Principal) and the Registrar*. They will work together to ensure that attendance is properly recorded for each ToR for the LP.

Completion of PINs

It is the ToR's responsibility to fill out all PINs. PIN templates are located in the ***Shared Drive***, in the ***Dept. of Education Folder,*** then ***PIN Template Folder***. This year we are utilizing one PIN template that can be used for all types of PINs. Please read the directions carefully. Always make a copy of the template and save it to your drive before continuing with filling out the information. All general education PINs will be sent to April Saade (Elementary Principal) or Lorrie Wood (Secondary Principal) for review before being sent to the office staff. Any time a second PIN is issued, an AIM meeting will be required. In some cases an SST may be held in lieu of the AIM meeting to ensure the student is being supported adequately. The respective department will make this determination and will inform families for which meeting they should attend. PINs remain in the student file for the academic school year and start over each new school year. If a student receives three PINs in one school year, a third party review may be held by the AD of Education in conjunction with the parent, ToR, and an unbiased third party to see if independent study is in the best interest of the student. The determination is final and immediate. For students receiving special education, an IEP team meeting is required to be held following the issuance of a third PIN. Leah Vides (SPED Program Specialist) should be made aware of all PINs being issued to students with IEPs. Students with IEPs may not be referred to third party review until after the IEP meeting is held to discuss the impact of the student's disability.

Behavior Improvement Plans

Excel Academy will issue a Behavioral Improvement Plan for a student if they violate Excel Academy's behavioral standards. The consequence of violating these behavioral standards as outlined in the BIP, may lead to suspension or from Excel Academy.

For students who commit violations such as dishonesty, cheating, disruption, and inappropriate language, a BIP will be issued with consequences individually designed to help restore the individual student back into good standing with the school. These include but are not limited to a family meeting with the Teacher of Record and Administration, reflecting on the violation, creating a plan of action for redirecting future behavior, writing a letter of apology, rewriting an assignment in question, removal from extra-curricular and/or co-curricular opportunities, removal from the National Honor Society, and/or an in-school suspension.

For students who commit plagiarism, the first offense will result in a zero on the assignment until the behavior is corrected. For the second offense, the student will be removed from the class and will receive an F in the course. If a student earns an F in a course that is required for graduation, then they will be required to repeat this course for credit. Any subsequent offenses will be dealt with on a case-by-case manner.

Violations that may result in suspension or immediate involuntary withdrawal are included in the school's charter petition.

Excel Academy has reviewed Education Code Section 48900 et seq., which describes the non charter schools' list of offenses and procedures to establish its procedures for suspensions and expulsions. The language that follows closely mirrors the language of Education Code Section 48900 et seq. The Charter School is committed to annual review of policies and procedures surrounding suspensions and expulsions and, as necessary, modification of the lists of offenses for which students are subject to suspension or expulsion.

When the Policy is violated, it may be necessary to suspend or expel a student from regular instruction. This policy shall serve as EACS's policy and procedures for student suspension and expulsion and it may be amended from time to time without the need to amend the charter so long as the amendments comport with legal requirements. EACS staff shall enforce disciplinary rules and procedures fairly and consistently among all students.

High School

HS Terms

Course Title: The course title is the general name recognized for what your student is taking, these are the required courses over the 4 years of high school.
Ex: CP English 9 A/B, CP Algebra 1 A/B, CP Biology w/lab A/B, CP Visual Arts, CP Spanish 1

- Course titles are what the state refers to when we must report which courses our students are enrolled in each year.

Class Name: The class name is specific to the class they are taking.
Ex: EDG English 9.

- Class names are what are shown on the report card and transcript giving a more specific picture to the students' educational journey.

Curriculum Content: The scope and sequence of a course. These contain the objectives and corresponding assignments for each unit and should align with the state standards.

CoCo: Compliance Coordinator - Every teacher who holds a valid, single-subject credential is a Compliance Coordinator.

Pacing Guide: A division of the curriculum content into monthly requirements to ensure that students complete the scope of the work in one school year. The curriculum content in SIS may serve as the pacing guide. ToRs need to download the CC from SIS, indicate work to complete per LP, make a copy, and share with the student and family.

Acceptable Samples: Student work that is acceptable to collect as monthly samples. These include:

- A unit test-strongly prefer that it comes from the publisher or course. All assessments must demonstrate high school level rigor. Final determination on acceptance will be determined by the CoCo.
- A final draft multi-paragraph essay or paper on a related topic. Paper must follow MLA formatting rules. **Papers/essays are required twice a semester**.

- A rough draft of an in-progress paper - a final draft is always preferred and cannot use final draft for future sample. ToRs need to ensure a final draft is completed.
- A lab write-up (science courses only) - must include title, intro/purpose, materials list, method, data, results, analysis, conclusion, and graphs or figures, if applicable. Refer to a Lab Report Template. **Labs are required twice a semester**.
- A project/presentation showing significant learning and application.
- A book report with critical analysis - may not be a simple summary.
- A written copy of a student-written speech or an oral presentation.
- Answers to a section of chapter questions or a chapter review.
- A timeline or map that clearly reflects high school level work/detail.
- A reflective paper (VAPA).
- Another high school-level sample as agreed upon by ToR/parent/student in advance.

Pacing Guide Dates

Pacing Benchmark Deadlines

Fall Semester – starts August 28th

9/22/23	25% complete (19 days)
10/18/23	50% complete (18 days)
11/06/23	75% complete (18 days)
11/18/23 - 11/26/23	Thanksgiving break
12/8/23	100% complete & online finals have been scheduled (13 days)

Spring Semester – December 18th

12/18-12/21	Career and College Readiness Week (no ETL classes)
12/22/23-1/7/24	Winter break
2/6/24	25% complete (25 days)
3/15/24	50% complete (26 days)
3/30/-4/7	Spring break
4/26/24	75% complete (25 days)
5/24/24	100% complete & online finals have been scheduled (22 days)

Important Sample Due Dates:

Each quarter the following are due for the monthly sample - English essay, science lab, honors project. If the English and/or science course is an honors course, then only the honors project is needed for the monthly sample.

LP 2 - 10/20/23
LP 4 - 12/15/23
LP 7 - 3/7/24
LP 10 - 6/4/24

Adding/Changing/Dropping Courses

Students adding, changing (including curriculum), or dropping a course can only do so within 10 school days of the start of the semester or within 10 school days of enrollment without penalty. 10-day window:

Fall - 8/28/23-9/8/23
Spring -12/18/23-1/16/24

See below for further clarification:

- Courses dropped on or before the 10th school day will not show on the transcript.
- Courses dropped after the 10th school day in the first and/or second semester will receive a “W”on the report card/transcript.
- Courses dropped after 10/20/23 for fall semester or 2/23/24 for spring semester will receive a/an “F” on the report card/transcript.

Withdrawals may only be issued to students who hold a minimum of six courses prior to the withdrawal and wherein the drop will not impact graduation requirements. Seniors carrying five courses may drop to a minimum of four courses as long as they carry sufficient credits to graduate.

- The minimum & maximum course policy is in place to ensure academic success.
- The minimum number of courses that high school students can register for is 5-6 courses per semester depending on the student’s respective grade level (see graduation track options below for details).
- 12th graders who have earned 180 credits prior to the start of their senior year, can register for 4 courses per semester, equaling 40 credits for the school year.
- If a student is participating in concurrent enrollment, then a minimum of 4 Excel Academy high school-level courses must be taken each semester they are registered for a college course.
- The maximum number of courses high school students can register for is 8 courses per semester including concurrent enrollment courses. See below for concurrent enrollment requirements.

Understanding A-G

- A Parent's Guide to A-G Requirements
- UC admissions requirements by subject
- CSU admissions requirements

A-G Protocol:

1) Every core high school is now considered A-G approved. Therefore, students must choose and complete course curricula from the High School Course Curriculum Catalog.
2) For students completing courses from an in-person provider, ToRs must verify that the corresponding course syllabus aligns with the Excel Academy approved CP coursework. This is because Excel Academy is the institution issuing the credits and not the provider.
3) For Master Agreements, the course names will be prefaced by BT for some electives, CP, EDG, EDY, FLV, LB, or TGS.

Community College Courses

Community College Courses - Concurrent Enrollment Policy

Students may request concurrent enrollment courses by following these steps:

1. Students and parents/guardians discuss concurrent enrollment options with their ToR.
2. ToR will discuss eligibility requirements which include the following: Students must have a minimum 3.0 GPA for academic courses or a 2.7 GPA for elective/vocational courses. Students must show college readiness in their respective core courses (ie. each community college sets their own prerequisites for determining high-school eligibility).
3. School Counselors will only approve college-level courses which are defined as courses that will earn college credit and are either UC/CSU transferable or applicable to earning an Associate's degree or higher. Courses not receiving credit will not be approved.
4. ToR completes Concurrent Enrollment Course Survey.
5. The High School Department either grants or denies approval for a student to take the requested community college course.
6. High School (9th-12th) students must be enrolled in at least 4 Excel classes (20 credits) per semester at Excel Academy to be considered eligible for concurrent enrollment at a community college. Students may take a maximum of 2 community college classes per semester while concurrently enrolled in Excel Academy. This may include one semester-length course and one interim session or two semester-length courses per semester.
7. Junior high (7th-8th) students interested in taking community college courses are limited to math (Algebra 1 or higher math) and/or world language. Please see the Community College Handbook for grade-level policy per community college.
8. Students must complete and sign the concurrent enrollment form obtained from the community college Admissions office and submit it to the Excel Registrar's office (registrar@excelacademy.education). Please note: The turn-around time for concurrent enrollment approval is 3-7 days depending on wet signature requirements.
9. It is the responsibility of each student to take this signed form back to their respective community college to submit and finalize registration.
10. It is also the responsibility of the student to know the community college's fees, registration, and deadline dates (information can be found on the college's website).

11. If a student's first choice is unavailable and/or if they are unable to register for courses, the student is responsible for informing their ToR and High School Counselor. In this circumstance, students **must** work with their ToR in either finding another course to add to their Master Agreement or removing the course from their schedule. Students need to be aware that if they are unable to register for a late-start college course, then they will be required to enroll in a late-start accelerated high school course with Excel Academy depending on their minimum course count. If an additional community college course is chosen, students must complete and submit an additional concurrent enrollment form to reinitiate the process.
12. Students must be aware and adhere to all college rules and regulations.
13. In order to confirm the course will transfer to the university of the student's choice, please consult with a Community College Counselor.
14. Per the Community College regulations and the CDE, only 5% of Excel Academy students per grade level can attend a community college during the summer. Priority approval will be given to those needing courses to graduate.
15. If a student is found to enroll in a college course that has not been approved by the School Counselor and does not meet Excel Academy's prerequisites for college courses, even if the student completes the course, they will not earn dual credit. The student will earn college credit but not high school credit. The student will be required to complete the respective high school course for graduation purposes.
16. Students will only receive dual college credit in courses that have prior approval from the School Counselor. This MUST be pre-approved via the concurrent enrollment form.
17. Grades from any concurrent enrollment course will not be reflected on the Excel Academy transcript until the official college transcript has been received and verified. Upon completion of the college course, students are required to send an **official transcript** to the Excel Academy Registrar's office. Upon receipt, the high school transcript will be updated to reflect grades/credits earned. Please send all transcript requests to:

Excel Academy Charter School
ATTN: Registrar Department
1 Technology Drive, Ste. I-811
Irvine, CA 92618

****If a student fails the community college class and the class/credits were planned toward graduation, then the ToR needs to alert Counselors ASAP to adjust the 4-year plan.

Honors Courses Process & Requirements:

Honors courses are designed to be more in-depth, challenging, and rigorous. Students may take honors courses with prior written approval. The student may submit the course for approval by following these steps:

1. ToR will discuss honors options with students and family
2. Student requests to register for an honors course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework
5. Honors courses require quarterly projects (see above dates)
6. ToR will assist students in meeting additional honors requirements
7. Students must meet the full criteria, or the course will not receive the honors designation
8. Honors credit will not be issued retroactively

AP Courses

Students may take AP courses through one of our online content and community providers with prior approval:

1. ToR will discuss AP options with students and family
2. Student requests to register for an honors course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework
5. ToR informs the student and family that the AP exam must be scheduled and completed through their local public high school. This should be done in early fall
6. Students take an AP exam through their local public high school in the spring

Additional Advanced Course Options

For students wishing to complete a year-long course in one semester (i.e. English 9 A/B) or two courses in the same subject simultaneously (i.e. English 9 A/B and English 10 A/B), they must choose an online curriculum from the High School Course Catalog or enroll in a concurrent enrollment course.

1. ToR will discuss advanced course options with student and family
2. Student requests to register for an accelerated course
3. ToR completes Advanced Course Request Survey
4. HS department verifies eligibility for a student to enroll in advanced coursework
5. ToR will aid the student in choosing curriculum that would work for this designation or follow the process for concurrent enrollment

For students who are credit deficient, they may request to complete two courses in the same subject simultaneously (i.e. English 9 A/B and English 10 A/B) if summer school is not an option. They must choose a curriculum from the High School Course Curriculum Handbookwith the exception of in-person provider courses.

Junior High students:

Qualified junior high students may take up to two, high school-level courses in either math (Algebra 1 or higher math) and/or world language.

Junior high students requesting to take a high school-level math course must meet the following eligibility requirements:

- Take a proctored and approved Algebra 1 or Integrated Math I readiness assessment with a score of 85 or higher.

And at least one of the following:

- Earn an 85% in a pre algebra course using approved pre algebra curriculum
- Earn 'exceeds standards' in math CAASP for the respective year requested
- Score 'At or above grade level' for 8th grade on 'end-of-year' view of local assessment (i.e. iReady)

Junior High students requesting to take a high school-level world language course must meet two of the following eligibility requirements:

- Student earns a "meets standards" on their CAASPP ELA for the respective year requested.
- Student earns an 85% or higher in English on their report card.
- Student completes a middle school LOTE course with an 85% or higher.
- Student demonstrates fluency in reading or writing in a LOTE.
- Student receives a recommendation from their Teacher of Record or former teacher.

All junior high students may enroll in a junior high or middle school level language course using instructional funds. No credit will be given on the transcript.

Junior high students may submit the course/s for approval, by following these steps:

- Student requests to take high school math and/or world language course/s with their ToR
- ToR completes the Survey for Advanced Courses
- High School Department will review each request to verify eligibility
- If approved, the high school course(s) will be overseen by the High School Department
- The course(s) will be indicated on the Master Agreement for credits, not weeks
- If a student wishes to take an honors-level math and/or world language course, in addition to requesting approval for the core course, they must also request for the honors designation. Please refer to the above honors request process. Upon approval for an honors-level math and/or world language course, students must follow Excel Academy honors requirements for this designation. The GPA will not be weighted because these courses do not count toward graduation credits
- Course/s must be approved by the High School Administration. Junior high school students will have to follow the same add/drop policies as high school students (see above policies).

- Transfer junior high students must show proof of current course enrollment from their previous school via their transcript in order to maintain a high school-level course approval.
- *Per the CA Dept. of Education, junior high students who take Algebra 1 or higher math and/or world language courses are still required to complete courses in both the respective high school math and world language required categories while in grades 9th-12th. Thus, high school-level courses taken in junior high do not count towards the 220 credits required for graduation.*

Sample Compliance:

1) Include the student's first name as it appears on MA - This can also be a nickname, if it makes sense. For example, Michael may appear on the MA, and Mike is fine for the sample. If the student's name is Jennifer and they write Carol, that will not work.
2) Include the full course title as it appears on the MA - Example Algebra 1 not math - if a teacher forgets the A or the B for a course, and the intended class is clearly evident, sample will be accepted.
3) Include the LP #.
4) Scan the document to make sure it is free of religious content. Content may include reference to religion only from an academic perspective.
5) Assignment must meet grade-level standards – readings must be high school level and work must reflect high school caliber.
   Pro Tip: If you are unsure if the literature is high school level, try the following search tools (lexile.com, download apps such as Levelit or Literacy Leveler)
6) Grade the assignment – This should be done by the parent/teacher but must be completed by the ToR if the parent does not grade the assignment (ToR can override if they disagree - they have final say). Do not cross out the parent grade. Simply write the "teacher grade" alongside.
7) If the sample is an essay, written book report, science lab, or major project and earned an A, it needs a rubric to show the grading – see rubrics in specific folders in Shared Drive>HSD.
8) There must be some indication for why a student earned the specific grade. For example, if a student earns a B-, it needs to be clear why they received a lower grade. This can be accomplished through teacher comments.
9) Page numbers are not necessary. However, if the work on the sample appears to be an insufficient amount of work for a high school course, then note page ⅕, for example.
10) Label all pages for work samples with more than one page (Name, LP, subject).
11) Assignment must show work (ie. math problems worked out, full sentence explanations for history and English).
12) Online work samples do not need additional work shown; the work printed from the online assignment or activity is sufficient.
13) Refer to the ToR Training Manual *Compliance* section for more details and the Compliance FAQs doc for answers to difficult and common questions.

The Compliance Coordinator (CoCo) Team

and their role in helping ToRs

1) **Checking curricula –** Compliance Coordinators, in conjunction with the Education Coordinators will verify if the new curriculum is acceptable to use. **Checking state standards –** All curricula needs to adhere to the current CA state standards. The CoCo for each specific subject will verify that the course closely aligns with the state standards.
2) **Checking monthly samples** -Every month the CoCos look at each uploaded high school sample to review for compliance and credibility. Each sample is either accepted or rejected. When you open SIS and notice a rejected sample notification, this is a notification that changes need to be made to the sample. Enter the sample section and click on the rejected sample. A note from the team will indicate what needs to be corrected. Please make the correction/s and reupload the new sample.
There is no need to email the CoCo that your sample has been corrected.

Secondary Cocos - Use these teachers to assign "HQT" for high school classes

English – Forest Muther
Math – Wendy Pendergraft
Science – Kim Platler
Social Studies – Jill Stowe
Spanish – Jill Stowe
VAPA –

ToR Responsibilities –
Each ToR is responsible for the following:

1) Helping new students HS New Student Checklist
2) Ensuring every student uses an approved curriculum from HS Curriculum Handbook
3) Filling out the Course of Study Elementary Doc or the Course of Study Secondary Doc
4) Adding course name to MA - TK - 12th missing student classes/curriculum
5) Bring the following to your first meeting: Curriculum Content for each course, copy of the Plagiarism Academic Honesty Pact for student to sign, Parent Letter and Google Fact Sheet.
6) Creating a Google Classroom
7) Creating a pacing guide for each course
8) Weekly checking online course work; highlighting which items have been completed; identifying which items student plans to complete for the next month
9) Monitor monthly progress for both online and textbook courses.
10) Viewing a body of work and collecting multiple samples (may need as backup)
11) Ensuring that students submit two essays each semester to Google Classroom to run through the plagiarism checker. Additionally, two science labs are required each semester as monthly samples.
12) Discussing grades ~ current progress & anticipated progress – keeping a written log or gradebook
13) Providing support to struggling students using the levels of support spreadsheet

14) Identify any students working at a 70% or below on a monthly progress doc.

15) Keeping written log of concerns in portal and creating a student support log (this will make any SST meeting much more successful and productive)

16) Students are required to take one CHYA course in junior high school and once when in high school. Parents can OPT OUT via email/letter. Place in SIS notes and archive.

17) Reviewing each sample for the following – proper heading, legible, enough work to merit a passing grade, no religious content, incorrect answers or work are marked accordingly, and an accurate grade with rubric when needed

18) Proctoring A-G online final exams in the fall and spring.

It is the ToR's responsibility to be checking in with HS students on a weekly basis. Specifically for online courses, it is important to view the 'score to date' which is the most accurate grade the student has in the course. Example: If a student is showing 87% as their current grade, but only completed 36% of a course, that just means their average grade on assignments is a B. However, if you add in the zeros for the incomplete work, the student would actually be receiving an F in the course. To sum up: The 'score to date' shows the actual grade with the zeros included.

Links for easy access to high school course information:

HS Course Course Catalog
HS Curriculum Handbook
A-G Courses
How to Handle Plagiarism
Google Classroom Instructions
High School Virtual Course Schedule
Excel Academy Charter School Handbook
Online CCP Price List & Ordering
Q & A HS Doc

For more information on high school related items, please review the various folders in the HSD section of the Shared Drive before reaching out to the admin team for questions.

Shared Drive High School Folder

- High School Helpful Hints Doc
- Detailed list of documents found in the ToR Manual and in the Shared Drive - High School - HSD.

Assessments

Assessment Section Overview

- Assessment Contents found in the ToR Manual and in the Shared Drive - Assessments - ASMT.
- Assessment Details (State and internal testing, proctoring, etc.)
- Assessment Guide for Parents - Share with parents at LP 1 - The parents receive this document when they sign the MA, etc. However, since they are reading and signing so many documents at once, it is crucial for the ToR to review this document with every parent explaining how it applies to each student at various grade levels.
- Protocol for Opting Out - MUST READ before discussing assessments with parents

Shared Drive Assessment Folder

Alternative Assessment Directions Folder

- Directions to administer alternative assessments in lieu of i-Ready

Assessment Folder

- Details pertaining to all state and internal assessments
- Assessment Guide for Parents - Share with parents at LP 1
- Opt Out Protocol - MUST READ before discussing assessments with parents
- Test Prep Information
- CAASPP Test Security Form - Collect ONE per family - If testing in person
- Testing Technology Loan Agreement

Goal Setting Folder

- Fall Goal Setting Student Form
- Spring Goal Setting Student Form
- Promoting Self-Efficacy and Goal Setting Across All Grade Levels PowerPoint

i-Ready Information Folder

- Directions for ToRs to get started with i-Ready
- Parent Tutorial

- i-Ready Certificates
- i-Ready Shared Doc. - used to add students, make edits, and indicate opt outs, etc.
- ToR Documentation of i-Ready Completion- Must complete monthly
- Letter to Parents Explaining i-Ready
- Directions to Administer the Alternative Assessments
- FAQ - i-Ready Accessibility

K/1 Benchmark Assessment Folder - in lieu of i-Ready

Fall and spring assessment directions, assessments, answer keys, and word count per minute chart

Math Placement Tests Folder

- Algebra and Geometry Placement Tests - administered by the ToR

PFT Folder

- Directions for administration of the PFT by the ToR
- Data Collection Sheet
- PFT Fillable Form - shows exercises and can be provided to parents

Report Card Folder

- Grading Scales
- ToR Directions
- FAQ
- Progress Reports
- Sample Completed Progress Report
- Fall and Spring Letters to Parents
- How to Create a Report Card

ToR Student Tracking Spreadsheet Folder

- ToR Student Tracking Spreadsheet - **HIGHLY ENCOURAGED TO UTILIZE - MAKE A COPY FIRST!**

TK-5 Students - REQUIRED for students in grades TK-5

Report Cards

Report cards are required for students in grades TK - 12. Please have the necessary discussions with parents prior to grading so parents are aware of the grades prior to receiving the report card(s). The grades administered on the report card are final, as determined by the ToR and the administration. Please refer to the *Grading Scales* document (included in the handbook and shared assessment folder) and the directions for administering grades.

Grading Scales

TK-5 Students
The 4 – 1 grading scale that Excel Academy implements will give parents a clear understanding of student performance and progress.

4 Exemplary – Student consistently demonstrates an in-depth understanding of the standards, concepts, and skills taught during this reporting period. Student is working above grade level and produces outstanding work with little help or reteaching.

3 Proficient: Student consistently demonstrates an understanding of the standards, concepts, and skills taught during this reporting period. Student is meeting grade-level expectations, and able to complete assignments with appropriate amount of instruction and assistance.

2 Approaching Proficiency: Student is approaching an understanding of the standards, concepts, and skills taught during this reporting period. Student is working towards grade-level expectations. Student requires many tools and reteaching to understand concepts being taught, works at a slower pace, or works slightly below grade level at a faster pace.

1 Non-proficient: Student does not yet demonstrate an understanding of the standards, concepts, and skills taught during this reporting period. Student is working far below grade-level expectations. Student may have difficulty understanding new concepts.

***Please understand that a student who earns a "3" is at grade level and is where he/she needs to be working at this time. A student who earns a "4" is working above grade level and consistently provides excellent work in all areas of the course.**

Grades 6 – 12
Students in grades 6 through 12 will earn grades using the standard A-F scale (see below). Grades will be specific to the grading scale.

*Outstanding performance in mastery of the subject. Achievement of superior quality.
98 - 100 = A+
93 - 97 = A
90 - 92 = A-

*Consistent performance in achievement beyond the usual requirement. Achievement of high quality.
88 - 89 = B+
83 - 87 = B

80 - 82 = B-

*Performance meets grade-level standards and expectations. Achievement suggests sufficient understanding of the subject/course.
78 - 79 = C+
73 - 77 = C
70 - 72 = C-

*Minimally acceptable performance of course-level material. Achievement suggests below-average understanding.
68 - 69 = D+
63 - 67 = D
60 - 62 = D-

*Achievement is at a level insufficient to demonstrate an understanding of the basic elements of the course and will not count towards graduation requirements.
59 and below = F

*****Students taking online A-G courses or Community College courses will be graded by the instructor teaching the course**

OPTING OUT OF STATE TESTING

As TORs and representatives of a state funded charter school, we want to discourage parents from opting out students from testing, and emphasize the positive aspects of test taking. Please refer to the information provided below to help you address this subject if necessary.

Q: Are there specific forms approved for opting out?

The answer is **NO**. There are many created forms found online, but there is not an official form for opting out of state testing.

Q: As employees of Excel Academy, why is it important to encourage state testing?

The state has issued a mandatory 95% participation rate for state testing. It is our role as teachers to encourage and educate our families to participate in testing. Opting out of state testing cannot be an option. Effective during the 21/22 school year, if CAASPP participation rates fall below 95%, our charter school will suffer significant penalties when it comes to

reporting the school's performance measurement. Students who do not participate in testing will ultimately be assigned the lowest scale score possible which will hinder the overall performance score of the school. Charter Schools who are designated as low performing are subject to non-renewal. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families. We want to work together to continue to provide a one of a kind top notch educational experience for our students.

Q: What can we share with parents to encourage participation in state testing?

We must let parents know that instructional funds and our charter are dependent upon participation in state testing. State testing is the primary way data is gathered to show stability and growth in a school. **Without data and accountability, districts do not want to hold a charter; therefore, Excel Academy could be at risk.**

Please reiterate the following message to parents/guardians.
Effective during the 21/22 school year, if CAASPP participation rates fall below 95%, our charter school will suffer significant penalties when it comes to reporting the school's performance measurement. Students who do not participate in testing will ultimately be assigned the lowest scale score possible which will hinder the overall performance score of the school. Charter Schools who are designated as low performing are subject to non-renewal. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families. We want to work together to continue to provide a one of a kind top notch educational experience for our students.

Excel Academy is successful in making testing a fun and positive experience for the students and the parents. We want to encourage and support parents and assure them that there is nothing to be afraid of. We must be very mindful of our delivery and attitude and how much that will influence the decisions our parents make. If a parent is negative about state testing, ask the parents what their concerns are and work to address them through understanding, compassion, and education.

- Share with parents that testing is an important life skill.
- Results from testing can be helpful in guiding curriculum choices and instruction.
- Parents have the right to choose if they want to share the test scores with their student(s).
- The experience of test taking is important.
- In person testing - TBD - More than likely we will remain virtual.
    - The testing sites are safe, and our students are monitored and supervised by our credentialed teachers and staff in and out of the testing rooms, outside of the restrooms, and in the snack area.
    - Parents are welcome to stay at most of the testing locations outside of the testing rooms, and can carpool to the designated locations.
- The state requires 95% participation in state testing or Excel's charter could be at stake.

- The state provides the funding for Excel Academy's charter which is passed down to Excel families through instructional funding. Without a charter, our families would not have the instructional funding to enhance their students' education through purchased curriculum, materials, and vendor courses.

Q: Is there a consequence for students who do not participate in state testing?

Although it is the parent or legal guardian's right to opt out of state testing, as a public charter school, Excel Academy is required and legally has the right to request data for all students to show academic growth and progress.

If testing is in person, participation in an alternative assessment *at the testing location* for the required two days will need to be enforced. If testing is virtual, ELA and math testing will be separated over two set sessions.

*****IMPORTANT*****

When do we mention the alternative assessment to state testing to parents who want to opt out their student(s) from state testing?

The alternative assessment can only be suggested if a parent strongly refuses participation in the state assessments AND is starting the opt out process described below.

1. **DO NOT mention the alternative assessment prior to having parents understand the importance of state testing.**
2. **We DO NOT want our Excel Academy families to choose the alternative assessments in lieu of state testing.**
3. **Excel Academy DOES NOT receive participation credit from the state of California for these internal assessments.**
4. **CAASPP results are reflected on the state's dashboard, not internal assessments.**

Parents who decline the alternative assessments are to be notified that their student(s) will earn a PIN for EACH assessment that is not completed.

What is an alternative assessment?

- An alternative assessment will be issued in both math and language arts.
- The paper pencil assessments will cover grade level standards and will be multiple choice and some fill in completion.
- The assessments will be completed and graded, and parents will be notified of the scores. Parents will not receive copies of the assessments, as these tests are the property of Excel Academy.

Where do students take the alternative assessments?

If in person testing takes place, parents of students taking the alternative assessments will register as they would if their students were taking the state assessments. They would choose a testing location and two dates to attend (one for math and one for language arts). **STUDENTS WILL NOT BE ALLOWED TO TAKE THESE ASSESSMENTS AT AN LP MEETING OR ANOTHER LOCATION. These students will be treated equally to those who are taking the state assessments.**

If virtual testing resumes, ToRs will set two Zoom sessions to test their students in ELA and math.

Does the TOR need to notify the Director of Assessment and Accountability if a student is opting out of the state assessments, but has agreed to take the alternative assessments?

Yes, the Director of Assessment and Accountability will need to be informed by the ToR that the student is taking the alternative assessments either at the specific location (in person) or via Zoom (virtual) and the specific dates to ensure that the Director of Assessment and Accountability provides the assessments on time.

Can a student earn a PIN for NOT participating in state testing?

We cannot issue a PIN for a student who does not participate in state testing because parents have the legal right to opt out. **HOWEVER**, because Excel Academy has the legal right to assess students "in house" and collect data showing progress and growth, and is required to do so by the Governing Board and districts holding our charters, we can issue a PIN for each day the student does not show up to one of the designated testing locations to take the alternative assessments. **Students can earn two PINS for not participating in both language arts and math alternative assessments at the testing locations or virtually.**

Example - A PIN will be administered if a student does not take the math alternative assessment. A PIN will be administered if a student does not take the language arts alternative assessment.

Will PINs be given to students who are "no shows" at testing and make-ups?

Yes, this policy will also hold true for students who are "no shows" at testing and make-ups.

What are the proper steps to handle parents who insist on opting out of state testing?

Parents will need to follow the opt out process AFTER the ToR has tried to encourage participation AND has explained the alternative assessment.

All parents of students who opt out of state testing will need to complete the following steps to submit an opt out notification to Excel Academy's Director of Assessment and Accountability. (Including parents of students who choose to have their students participate in the alternative assessment.) These opt out letters will be filed in case of an audit.

If the family is persistent about opting out, inform the parent that a letter **MUST** be submitted via email to the Director of Assessment and Accountability.
Letter MUST include:

- Student(s) names
- Grade level(s)
- Parent Name
- Waiving - **ALL** CAASPP testing (SBAC Math, SBAC ELA & CAST Science for grades 5, 8, or grade level determined by the state of California) **OR PART** of testing and **MUST SPECIFY** which test(s)
- Include whether or not the student will be taking the alternative assessments in lieu of state testing at a designated testing location (if in person) or via Zoom (if virtual).

Please reach out to the Director of Assessment and Accountability if you have any questions. **As the TOR, it is your responsibility to share all aspects of testing with your families, including the PIN policy, prior to the Director of Assessment and Accountability contacting the families.**

State and Local Assessments

(CAASPP, ELPAC, PFT, and i-Ready)

Standardized Testing

The California Assessment of Student Performance and Progress (CAASPP) is the state-mandated academic testing program. All charter schools are required to administer the CAASPP as well as other state-mandated assessments such as the ELPAC and PFT (Ed. Code, § 47605(c)(1). CAASPP is a system intended to provide information that can be used to monitor student progress on an annual basis and ensure that all students leave high school ready for college and career. Following the spring of each year, individual student test score reports are provided to parents. Student score reports will include an overall score and a description of the student's achievement level for English Language Arts (ELA) and mathematics.

In California, parents may opt out of state mandated academic testing by submitting a written request to the school each year, but this only applies to the state mandated assessments. *We do not recommend opting out.* There is no law permitting a parent to opt out of the school's internal assessments, and therefore, students are required to participate in all internal assessments. Every ToR MUST read the document titled Excel Academy - Protocol for Opting Out of Assessments 23-24- ASMT located in the shared drive under assessments.

Charter schools exist in a performance-based accountability system where they are held accountable for student academic performance. In fact, a charter school cannot continue to exist without collecting data on students' performance on a variety of assessments and indicators. When a charter authorizer is evaluating whether to revoke a school's charter, or 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).) Therefore, it is important during the revocation and renewal processes for a school to gather as much positive academic achievement data as possible to show progress in student performance. Evaluating graduation, attendance, suspension, and English Learner (EL) reclassification rates are also ways to show student progress. However, student participation and performance on state mandated assessments is by far the most common and used method, and results are indicated on the California School Dashboard and System of Support. The Dashboard is a powerful online tool to help districts and schools identify strengths and weaknesses and pinpoint student groups that may be struggling (https://www.cde.ca.gov/ta/ac/cm/). Your student's participation in state mandated assessments is highly encouraged and recommended. **Please remember that results and attendance from all state tests are directly tied to school funding per recent LCFF legislation and are an integral part in maintaining partnerships with our chartering school districts.**

If you have any questions, please contact Excel Academy's Director of Assessment and Accountability, Jenny Craig at jcraig@excelacademy.education.

Proctoring

- ToRs will proctor the i-Ready assessments virtually. For specific details, see Assessments-ASMT > i-Ready Information
-
    - i-Ready proctoring will be done by ToRs
    - Testing window #1 - 9/5 - 9/18 - ALL K- 11th GRADE STUDENTS
    - Testing window #2 - 11/6 - 11/17 WIN AND SHORELINE STUDENTS ONLY & THOSE WHO CHOOSE TO TAKE A MID-YEAR ASSESSMENT
    - Testing window #3 - ¾ - 3/15 - ALL K - 11th GRADE STUDENTS
    - Each testing window will begin with 5 days for math, 5 days for reading, and 5 days for make-ups.
    - ToRs will create their own schedules for testing (i.e. block two hours per day for

students to attend a Zoom session - students will login on their own)It is highly suggested that ToRs test students the first two weeks of each window and team with other ToRs to proctor.
    - As of July 18, 2021, Google Chrome Versions 80 and below will no longer be able to access the i-Ready Platform. Students will have access to borrowing an EACS computer if needed.

- ToRs will proctor CAASPP assessments
    - CAASPP proctoring days will be based on student enrollment and the need of 1:1 test takers. The SPED team will proctor students with 1:1 accommodations provided the students have current IEPs. The number of necessary ToR proctoring days assigned are not set at this time if the state moves forward with in person testing. If EACS continues with virtual testing, ToRs will resume testing students on their own. It is highly suggested that ToRs work with other ToRs to create a schedule and share the proctoring responsibilities.

English Language Proficiency Assessments for California (ELPAC)

The English Language Proficiency Assessments for California (ELPAC) is aligned with the 2012 California English Language Development Standards. The ELPAC consists of two separate assessments: one for the initial identification of students as English Learners (ELs) and a second for the annual summative assessment to measure a student's progress in learning English and to identify the student's level of ELP (cde.ca.gov).

- Grades K-12 - TK students take the kindergarten assessment
- English Learners only
- Test Administration
    1. Initial Identification - When student enrolls with Excel Academy - Dates and Locations TBD (Assessment will be administered by trained proctors.)
    2. Annual Summative Assessment - Beginning in the Spring
- Results are provided by the California Department of Education and sent to the school. Once received, parents will receive a letter explaining student score reports.

English Learners (ELs)

ELs are targeted for ELPAC testing when the Home Language Survey indicates that their primary home language is a language other than English and are tested during the school year.

- Excel Academy students are in an English Language Mainstream academic program with an English Language Development (ELD) Support Curriculum. The mainstream curriculum is taught and/or supported by CLAD certified teachers and includes vocabulary and visual thematic-based support. ELs are accommodated within this curriculum by providing multiple opportunities to demonstrate mastery on all assessments, including writing assignments.
- Progress in their assigned ELD curriculum is monitored weekly by the ToR. Excel Academy requires students to participate in both synchronous and asynchronous instruction for a total of 150 minutes each week. ***Questions pertaining to ELD curriculum can be directed to Tamara Murphy, Intervention Coordinator.***
- Both the parent, as the primary educator, and the ToR are responsible for ensuring adequate progress through the ELD curriculum.

Criteria for Reclassification to Fluent English Proficient (RFEP)
In order to be reclassified to Fluent English Proficient (FEP) and exit the EL program, students must meet the following criteria:

- Minimum ELPAC overall score of 4
- Teacher Evaluation
- Parent Approval
- CAASPP - Smarter Balanced and/or Local Assessments (i.e. i-Ready) can also be used in determining student readiness for redesignation

CAASPP - California Assessment of Student Performance and Progress

California Science Test (CAST) – Computer Based Assessment

- The California Science Test (CAST) is an online test based on the California Next Generation Science Standards (NGSS).
- Participation in the CAST is required for all students in grades five and eight and for the pre-selected high school grades.
- All local educational agencies (LEAs) with eligible students in grades five and eight will administer the CAST. LEAs with eligible students in high school (i.e., students in grades ten, eleven, or twelve) will be pre-selected to participate in the spring assessment. The CAST uses the current California Assessment of Student Performance and Progress test delivery system and will only be administered online (www.caaspp.org).

Smarter Balanced Assessment Consortium (SBAC) – Computer-Based Test

With new state standards, students are working harder, thinking more critically, and applying their learning to the real world. To measure these new standards, educators from states using Smarter tests have worked together to develop new, high-quality tests in English and math for grades 3–8 and 11. Using computer adaptive technology, the tests are customized to every student (smarterbalanced.org).

- Grades 3 - 8 and 11
- ELA and Math – Computer Adaptive Tests (CAT)
- ELA and Math – Performance Tasks (PT)
- CAASPP - SBAC spring testing - Dates and Locations TBD
- Registration for the SBAC ELA/MATH/CAST will take place with the ToR.Information will be emailed to parents in February.
- At testing sites, whether in person or virtual, cell phones are highly discouraged, and *no* electronic devices are allowed during testing, including smart watches.
- If testing is in person…
    - Parents are notified when students have completed testing by a proctor at the site.
    - Parents are welcome to stay in the waiting area at most sites, but are not allowed in the testing rooms.
    - Technology usage by students is prohibited in the designated testing areas.
    - Photo ID may be *required* at pick-up.
    - Siblings picking up students MUST be old enough to have a photo ID and must be identified at the time of check-in.
    - Students may bring water and lunch to testing in a clear bag. Backpacks are not allowed.
    - Students will be encouraged to take breaks during testing (i.e. restroom and snack breaks).
    - Parents MUST review this information with their students.

Student Testing Participation Requirement

All students currently enrolled in Excel Academy are required to participate in the aforementioned tests (where applicable). Failure to participate or satisfy the above requirement with alternative paper-pencil assessments will result in Progress Improvement Notifications (PINs) being issued to the student. Please refer to Excel Academy's Progress Improvement Notification Policy and Opt Out Protocol document in the ToR manual. ToRs will need to reach out to the Director of Assessment and Accountability to issue a PIN. Once approved, the ToR will follow the guidelines of administering a PIN.

Smarter Balanced Assessment Consortium (SBAC) and California Standards Tests (CAST) for Science

Please refer parents to the *CAASPP Practice Tools for Students* document located in this manual, as well as the parent and student handbook and Excel's website. All ToRs should provide this document to their families prior to testing.

Please note that some of the practice tests do not provide answers or a score; however, it does provide your students with the experience of navigating through a sample test session, which is important to practice.

There are four major types of questions that students may see: multiple choice, multiple response, short answer, and performance assessments. Encourage your families to explore and discuss the practice tests with their students.

Physical Fitness Test (PFT) – California

The Healthy Fitness Zone standards are available on the California Department of Education Physical Fitness Test FITNESSGRAM: Healthy Fitness Zone Charts Web page. http://www.cde.ca.gov/

OPTING OUT OF REQUIRED ASSESSMENTS

Can parents opt out of the Physical Fitness Test (PFT) according to the California Department of Education?
The answer is no. There will not be an alternative assessment given in lieu of the PFT; therefore, the student will earn a PIN for not participating.

The general opt-out provision of California Education Code Section 60615 does not apply to the PFT. There are a limited number of allowable reasons for not participating in parts or all of the PFT (e.g., medical excuse, student with disabilities); therefore, most students cannot be excused from the PFT.

Can parents opt out of the ELPAC?
The answer is no. EL students will continue to be classified as English Learners until they pass the ELPAC as Reclassified Fluent English Proficient (RFEP).

Can parents opt out of i-Ready benchmark diagnostic assessments? The answer is yes, HOWEVER, ToRs need to discourage opting out of the i-Ready benchmark assessments

because the data provided is valuable for the progress and growth we want our students to achieve. i-Ready provides data that will assist with course planning, curriculum and materials, SST evaluations, IEP evaluations, and data that can be shared with the Governing Board and districts holding Excel Academy's charters. If a student opts out of i-Ready and does not complete the assigned alternative assessments in ELA and math, a PIN will be administered.

Are there alternative assessments that ToRs need to offer if parents opt out their student(s) from taking the i-Ready benchmark assessments?

YES! If parents choose to opt out of the i-Ready benchmark assessments, alternative paper pencil assessments in reading and math MUST be offered to avoid earning a PIN.

One PIN will be administered if a student does not take both required assessments (either i-Ready or alternative paper pencil assessments) during the set testing windows.

Who administers the paper pencil alternative assessments?
The ToR will administer the paper pencil alternative assessments.

What is the process to obtain the paper pencil assessments?
The ToR will need to notify the Director of Assessment and Accountability and request the paper pencil assessments through a shared Google document.

- name(s) of student(s)
- grade level(s) of student(s)
- reason for not taking the i-Ready benchmark assessments

The Director of Assessment and Accountability will email the assessments to the ToR and the ToR will make arrangements to proctor the tests in person or virtually at an LP meeting or another time and location.

Who will grade the alternative assessments?
Directions for administering and grading the alternative assessments are located in the shared assessment folder.

The ToR will be given the answer keys to the assessments provided by the Director of Assessment andAccountability . A grading template will be shared with the ToR to complete and provide to the parents.

ToRs of EL students will need to provide the results on the shared spreadsheet, as well as to Jenny Craig. Tamara Murphy and April Saade will need to be informed of any student who falls below grade level and is in need of support and interventions.

IMPORTANT

The alternative assessments do not provide the same level of feedback and results as i-Ready. Although the alternative assessments will provide necessary grade level information, i-Ready benchmark assessment results provide a greater, in-depth understanding of the students progress and gaps seen across grade levels due to the fact that i-Ready tests are adaptive diagnostics, and result in individualized lessons to assist students further.

Furthermore, ToRs should highly encourage their students to complete the individualized i-Ready lessons.

Assessment Guide for Parents

ToRs are responsible for providing a copy of the *Assessment Guide for Parents* (included in handbook) to each family at the first LP meeting. This form shows the tests that are required at each grade level. ***Parents/guardians will Docusign this document along with other essential forms; however, it is important to review the assessments in person.

- The ToR will indicate the students' names next to their grade levels and highlight the required assessments.
- One copy per family.
- Parents must sign the form indicating they have been notified of the required assessments.
- This document is a great tool for parents to refer to and begin a conversation about assessments. The parent will take the signed copy home.

Testing Resources

For additional information regarding assessments, please refer to Excel Academy's website under *Our Academy* and *Assessments*. For **CAASPP AND ELPAC practice tests**, please refer to *Parent Tools* and *Assessment Resources*. Excel Academy provides the following resources to students:

- Online practice tests links
- EACS created grade level paper pencil assessments in ELA and math
- Virtual test prep sessions

CAASPP Testing Security Form - If testing in person

ToRs must have each family complete one *CAASPP Testing Security Form* once families have registered for state testing. This form will be kept at the testing location in case of an emergency.

- The Director of Assessment and Accountability will notify all ToRs when the forms are due.

Proctoring of State Assessments

Virtual Testing:
ToRs are highly encouraged to work with other ToRs to create virtual testing sessions that are flexible and offer students choice in terms of available times. Multiple sessions over the course of the testing window should be offered to best meet the needs of all students. ToRs are 100% responsible for ensuring the completion of their students assessments.

In Person Testing:
Each year, Excel Academy participates in state testing at various locations throughout Southern California. The Director of Assessment and Accountability works to organize testing locations and a proctoring schedule that best meets the needs of all students. For this reason, it is essential that we have ToRs working together to assist our students. Depending on the number of students registered for the testing sites, Excel Academy teachers will be assigned proctoring days based on student needs. While we try to place teachers at the closest locations to their homes, there will be times when teachers will need to drive quite a distance to proctor at various locations. We try to inform everyone of these location assignments well in advance, in order to allow for scheduling and childcare arrangements.

While we completely understand that sickness is out of the control of the teacher, and a teacher may be sick on an assigned proctoring day, it is the responsibility of the teacher to find someone to take his/her place. In addition, the teacher will need to take a sick day in Paycom and also proctor on another date to make-up for the missed proctoring day. If the teacher is unable to swap proctoring dates with another colleague, please note that the make-up proctoring day may or may not be at the same location, and could possibly be during make-up testing. The Director of Assessment and Accountability will do their best to place the teacher where they feel is necessary and in the best interest of the students. Make-up testing days will be scheduled once the coordinators solidify the number of students needing to test and the locations for testing. State testing is indeed a positive experience and would certainly not be as successful without the support of our Excel Academy Team.

Physical Fitness Test – California

The PFT provides information that can be used by (1) students to assess and plan personal fitness programs, (2) teachers to design the curriculum for physical education programs, and (3) parents and guardians to understand their children's fitness levels. The program also provides results that are used to monitor changes in the physical fitness of California students. By law (Education Code (EC) Section 60800 public schools are required to administer the PFT annually to all students in grades 5, 7 and 9 (cde.ca.gov).

- Grades 5, 7 and 9
- Dates vary in February through May
- The PFT is administered by the ToRs. ToRs will provide Excel Academy's Director of Assessment and Accountability with the results for each student tested. A data collection form will be provided prior to testing.
- Accommodations for Special Education students will be outlined in their IEPs or 504 Plans.
- If a parent states a student needs additional support, the ToR will need to notify the Director of Assessment and Accountability to verify accommodations.

Testing Includes:

1. Aerobic Capacity – One Mile Run
2. Abdominal Strength and Endurance – Curl Up
3. Upper Body Strength and Endurance – Push Up
4. Trunk Extensor Strength and Flexibility – Trunk Lift
5. Flexibility – Shoulder Stretch
6. Recording of Height and Weight

PFT Collection Data Sheet

ToRs are responsible for administering the PFT assessment to the students on their individual rosters in grades 5, 7, and 9. Specific details will be provided to all ToRs by the Director of Assessment and Accountability in advance in order to begin preparation for testing.

Please plan a day and location (i.e. convenient park) to assess your students' ability to run a mile, to do curl-ups, trunk lifts, push-ups, and the shoulder stretch. **ToRs may not assist the students on any of the exercises. This includes holding feet down during curl-ups. All exercises MUST be completed solely by the students. In addition, parents are**

not allowed to test the students or assist with testing while students are taking the PFT assessment. Please refer to the *PFT Fillable Form* (included in the handbook and shared drive under Assessment) for you to see the directions for each individual exercise. Please remember to bring a ruler to measure the trunk lift, make a strip of paper for students to use as a marker for their hands for the curl-ups, and a stopwatch to record the minutes and seconds for the mile. **You do not need to document anything on the *PFT Fillable Form*. Please email it to your families, so they can see each exercise and can practice at home in advance. Your documentation will be on the *PFT Collection Data Sheet*.** ToRs will document the information for each student on this sheet and email the document to the Assistant Director of Assessment andSpecial Programs.

The Director of Assessment and Accountability will keep the ToRs informed regarding the testing window and due date for the *PFT Collection Data Sheet*.

Recommendation - Try to buddy up with a few other ToRs to test your students together. The experience is even more enjoyable when you are working with others to create a low-key, positive environment for your students. For instance, in the past, groups of ToRs held the PFT at a nearby park on a designated weekday and everyone worked together to assess students. It's a great idea to go early and map out the one mile run.

When you are emailing your families about your specific testing date and location, please make sure to ask the families to be on time and have each student prepared with running shoes, a water bottle, a towel or an exercise mat (only if the student already has one), and comfortable, breathable athletic attire.

i-Ready Benchmark Assessments – Computer Based Tests - (K-11)

i-Ready benchmark assessments are adaptive diagnostic tests that will indicate mastery and identify learning gaps in students K-11. This particular assessment will be given in the fall to provide ToRs and parents pertinent knowledge to assist with academic support and guidance, mid year to those who are in the WIN program and want to retake the assessments, and in the spring to determine growth and goals prior to state testing.

- Test Administration –

  When we report our data, the data reflected is always in *standard view.* ***Although there are paper pencil assessments in lieu of i-Ready for students in grades K-11, PLEASE encourage ALL of your students to take the i-Ready assessments and utilize the personalized lessons (available for grades K-8). The i-Ready data that is collected is essential for telling our story to our stakeholders, on the LCAP, etc.

  Benchmark Diagnostic #1 - FALL

  - All students in grades K-11 are required to take the i-Ready benchmark assessments (ELA and math).
  - ToRs will proctor students virtually!

- IF a student has specific accommodations outlined on the IEP/504 AND the SPED team/504 Coordinator deems it appropriate for the accommodations to be applied to the i-Ready assessments, the ToR MAY need to proctor the student in person.
- The results shared with the parents/students will be in *standard view* only!
- **Please see the Intervention section for WIN and Shoreline student identification.
- ALL students need to be encouraged to complete the personalized i-Ready lessons that are provided upon completion of the ELA and math assessments.

Benchmark Diagnostic # 2 - WINTER

- ONLY students who are in WIN (falling into tiers 2 and 3 on benchmark #1) and identified as Shoreline will be required to take the second benchmark assessment.
- This will give WIN and Shoreline students an opportunity to test out if they have made sufficient progress. See the Intervention section for details.
- ToRs will ONLY proctor students on their rosters who are WIN or Shoreline students, unless a tier 1 student chooses to retest.
- The results shared with the parents/students will be in *standard view* only!

Benchmark Diagnostic #3 - SPRING

- All students in grades K-11 are required to take the i-Ready benchmark assessments (ELA and math).
- ToRs will proctor students virtually!
- IF a student has specific accommodations outlined on the IEP/504 AND the SPED team/Intervention Coordinator deems it appropriate for the accommodations to be applied to the i-Ready assessments, the ToR MAY need to proctor the student in person.

- The results shared with the parents/students will be in *standard view* only!
- **Please see the Intervention section for WIN and Shoreline student identification.

Important -

- Newly enrolled students will be required to take the i-Ready assessments immediately upon enrollment.
- ToRs will provide the student's score report/data to parents once students have completed both reading and math assessments.
- ToRs will encourage their students to consistently complete the individualized lessons.

*****Alternative paper pencil assessments are available for students in K-11 who opt out of taking the i-Ready assessments. PLEASE ENCOURAGE i-READY TESTING!**

Final Examinations of Online Courses

All students taking online courses with final exams that require proctors, will be given the exams in person. They will be administered by appropriate Excel Academy Staff in the fall and spring where applicable. Please reach out directly to the High School team for specific details.

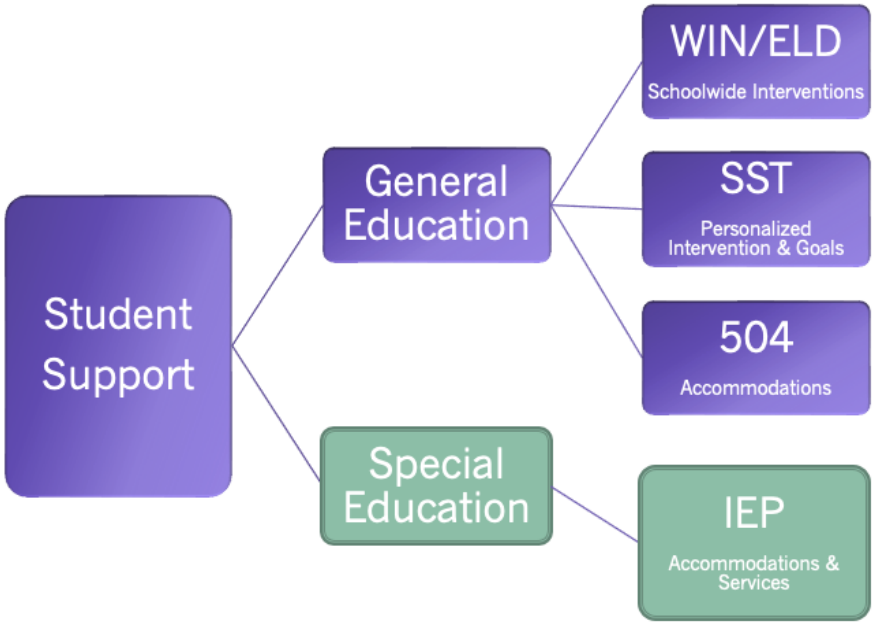
Intervention

Who to Contact

WIN Program	Sarah Horikawa	**WIN & ELD Classes**	Tamara Murphy
WIN Compliance	Sarah Horikawa	**Homeless/Foster Youth**	Tamara Murphy
SST Meetings TK-6	Tamara Murphy	**ELD Program**	Tamara Murphy

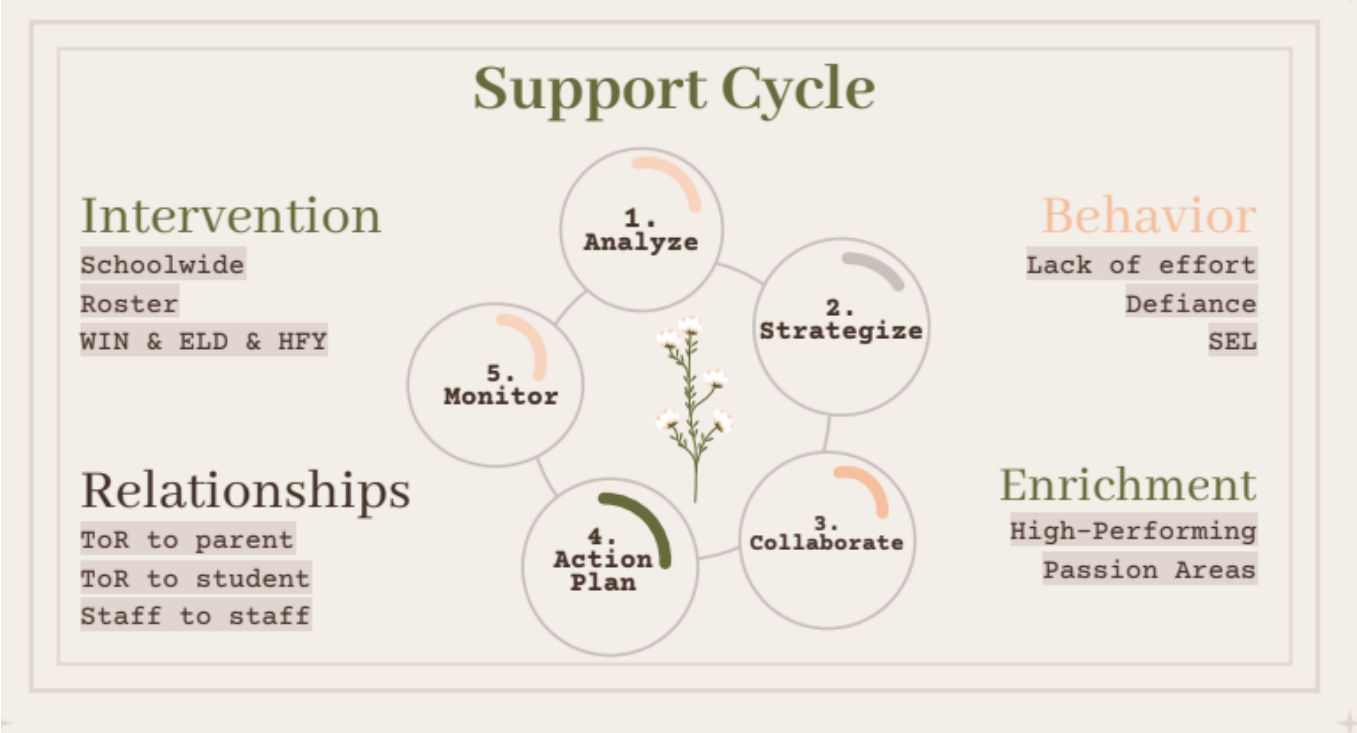
SST Meetings 7-12	Alison DeSchaine	**Cultural Awareness**	Tamara Murphy
504 Meetings TK-6	April Saade	**SPED Referrals**	Noell Scott & Tamara Murphy
504 Meetings 7-12	School Counselors	**Acceleration/Retention**	April Saade

Types of Student Support



Support Cycle

The Support Cycle may be used to address challenges in any area. Most often it is utilized with students, yet it may be helpful to implement with families and staff members, as well.



WIN Intervention Program
(What I Need)

Due Diligence

As a Teacher of Record, it is your responsibility to ensure that students are supported and progressing adequately. It is critical that you consistently monitor your students' academic, social, and emotional needs.

- Be sure you support your students with WIN compliance.
- Create a *Student Support Log* and choose interventions that may be helpful
- Share the log with your SST Contact if the interventions are not helping the student make progress.
- **It is critical that you reach out for additional support and request SST (Student Success Team) meetings when necessary.

Who:

WIN program is required for students in **1st-8th grade**
WIN students are identified by i-Ready diagnostic scores.
Students can test into and out of the WIN program with each test (Fall, Mid-Year, Spring).
Students required to participate in the WIN program are indicated below:

- Overall score (*standard view*) is **RED**

- Overall score (*standard view*) is **YELLOW** ***AND*** **BELOW 50th percentile** (See National Norm)

What:

- The *WIN Program* is targeted, academic intervention and progress monitoring. Monthly plans are outlined in the **WIN Math Plan** and **WIN Reading Plan**.
- A student's WIN program may also include recommended **WIN Live** small group instruction. Students are selected by the Intervention Team.

Why:

- As educators, it is our due diligence & our moral imperative to ensure that each student can access grade-level standards.
- The state of California requires every public school to have a *Multi-Tiered System of Supports (MTSS)* in place to help at-promise students reach state standards and make adequate academic progress. (https://www.cde.ca.gov/ci/cr/ri/)

Important:

The WIN program is REQUIRED per the *Acknowledgment of Responsibilities* signed in the *Master Agreement***.** Therefore, Parent, Student and ToR participation is required. If students do not participate in the WIN Program they may receive a PIN (Progress Improvement Notification).

Student Success Team (SST)

Process, Forms, & ToR Responsibilities

TK-6 SST Meetings: Tamara Murphy, tmurphy@excelacademy.education
7-12 SST Meetings: Allison DeSchaine, adeschaine@excelacademy.education

An SST (Student Success Team) is a problem solving group that meets to develop strategies and interventions to assist students with academic, attendance, behavioral, &/or social-emotional challenges. Please refer to the Pre-SST Resources & SST Info & Directions for more information.

English Learners

Curriculum, Policies, & ToR Responsibilities

TK-12 Designation & ELPAC Assessment - Jenny Craig, jcraig@excelacademy.education
TK-12 Curriculum, Instruction, & Support - Tamara Murphy, tmurphy@excelacademy.education
Compliance - Intervention@excelacademy.education

Designation

Students are designated as English Learners based on their results from the Initial ELPAC assessment. ELs have the opportunity to redesignate if they earn an overall score of 4 on their Summative ELPAC assessment. This assessment is only offered once annually, in the spring. Please refer to the ASSESSMENT section above for further details. The SIS identification for ELs is a red asterisk. Select the asterisk to view current status details, select "tests" to see their ELPAC assessment scores.

ELD Program Requirements

Excel Academy requires all students identified as English Learners to participate in our ELD (English Language Development) Program through both synchronous and asynchronous instruction. Please see the ELD Handbook for ToRs for more information.

Translation & Interpretation Resources

Please refer to our Translation & Interpretation Resources for detailed information.

504 Accommodation Plans

Process & ToR Responsibilities

EACS 504 Coordinator: April Saade, assade@excelacademy.education
TK-6 504 Meetings: April Saade
7-12 504 Meetings: School Counselors

Please view 504 Plans Explained for an overview of 504 Plans. It is important to remember that **504 Plans are a function of general education**, not special education. Most often, new 504 Plans will first be addressed through an SST meeting to gather more information and to determine if a 504 Plan is the proper response to the concern. 504 Plan requests should be addressed in a timely manner to best support the student, parent, and ToR. **Please notify the appropriate 504 contact (listed above)as soon as the possibility of a 504 Plan is discussed.**

Special Education Assessment Requests

IEP Requests: Process, Form, & ToR Responsibilities

School Psychologist: Noell Scott, nscott@excelacademy.education
Intervention Coordinator: Tamara Murphy, tmurphy@excelacademy.education

All special education assessment requests will begin with a *Request for SPED Referral* meeting to document concerns. **If a parent requests a special education assessment, verbally**

or in writing, please notify the *Special Education Coordinator & cc Intervention Coordinator* immediately. The Special Education Referral Form will be shared with you. Please fill it out as soon as possible. A meeting will be arranged to gather more information about the referral concerns. We will also clarify how the process works in our model.

Homeless, Foster, Mobile Youth (McKinney-Vento)

Intervention Coordinator:: Tamara Murphy, tmurphy@excelacademy.education

Definition of Homelessness

The McKinney-Vento Act defines homeless children and youth as individuals who lack a fixed, regular, and adequate nighttime residence.

McKinney-Vento Assistance Act

- The McKinney-Vento Homeless Assistance Act (McKinney-Vento Act) (42 U.S.C. § 11431-11435) is federal legislation that ensures the educational rights and protections of children and youth experiencing homelessness. It requires all local educational agencies (LEAs) to ensure that homeless students have access to the same free, appropriate public education, including public preschools, as provided to other children and youth.

McKinney-Vento Identification

- Identified through enrollment registration packet - McKinney-Vento Form
- SIS Label is a yellow asterisk
- ToR and/or Coordinator observation - Notify Intervention Coordinator; encourage family to update MKV Form

Homeless & Foster Students

ToRs must notify the Intervention Coordinator when a family makes you aware that they are residing outside of Kern, Los Angeles, San Bernardino, Riverside, Orange, or San Diego county.

Refer to our Homeless, Foster & Mobile Youth Rights & Support Process for detailed information.

Grade Retention & Acceleration Requests

Elementary Principal: April Saade, assade@excelacademy.education

The general philosophy is that because Excel Academy offers personalized learning, retention & acceleration are rarely necessary. **If a parent is requesting retention or acceleration, the ToR should reach out to the Elementary Principal.** Please also review Retention & Acceleration Policies & Processes.

Community

Shared Drive Community Folder

- Excel Academy Permission Slips
- Waiver - When Parent B Takes Student A Forms
- Authorized Chaperone and Non-Student Sibling List

Field Trips/Community Events

In order to offer quality field trips each year, we depend on our teachers to help chaperone throughout the year. As part of your contract, Personalized Path ToRs are required to fulfill service requirements toward field trips and/or community events. Virtual Path ToRs are not required to complete these duties, but may participate if they choose to do so.

Each ToR may choose one of the following options (see table below) to fulfill their yearly requirements. Throughout the school year each ToR will document what they have completed in each column and change the pink cell to green. By the end of the school year, each column that is highlighted in pink should appear in green. Ex. If a ToR attended a field trip to Banducci's Farm, the ToR would record the event and the date under the field trip column and highlight the cell green: Banducci's Farm 10/27/23. The ToR would continue this process by signing up for categories that will fulfill their yearly requirement.

Elementary Community Requirements 23-24

Secondary Community Requirements 23-24

Option 1			
Regional Event	**Field Trips**	**Outdoor Classroom**	**Virtual Lessons**
Option 2			
Regional Event	**Field Trips**	**Outdoor Classroom**	**Virtual Lessons**
Option 3			
Regional Event	**Field Trips**	**Outdoor Classroom**	**Virtual Lessons**

Per legal counsel, children of staff who are not enrolled Excel Academy students, may not attend field trips. If your child is an Excel Academy student and you are signed up to chaperone, your child must have a designated guardian attending with them. Waivers should reflect the information of the guardian in attendance and tickets, when applicable, must be purchased for this guardian.

Chaperone Checklist

- **Outdoor Classroom Days** Reach out to the Community Liaison in charge of the park day with any questions.
- Wear your Excel Academy shirt/sweatshirt (and name tag if available).
- Bring your Excel Academy backpack and make sure you have your first aid kit.
- Bring Excel Academy signage, flag, and/or umbrella.
- Please take photos and send them to the Social Media Liaison (Michelle Moran).

Field Trips

- Wear your Excel Academy shirt/sweatshirt (and name tag if available).

- Bring your Excel Academy backpack and make sure you have your first aid kit.
- Double check your clipboard for extra copies of waivers. Copy included below and within the Community Folder of ToR Manual.
    - Waivers: student, parent, sibling
    - Waivers: parent B brings student A (highlighted in Red below)
- Arrive 15 minutes earlier than the time the coordinator of the event asks the families to arrive, so you can notify the venue to anticipate our group's arrival and greet the families when they arrive.
- Reserve 15 minutes for our families to gather before tours or activities start. Please use this time period to:
    - Take attendance and check in families
    - Collect waivers if any are missing
- If it is a larger group, one ToR could help call/text families who are late and wait for them if necessary, while the other chaperone(s) stay with the rest of the group and move on to participate in the field trip activities.
    - The roster will note any special circumstances regarding transportation. <u>If a student arrives with another family (that has not been noted or communicated to you previously by the coordinator), you must call the field trip coordinator.</u>

- Stay with the group until the field trip is over. It is our hope that the presence of Excel Academy teachers at the field trips makes the trips more intimate and allows parents to feel the support of our team, and students feel they truly belong to an incredible school.
- Some parents do not want any pictures, front or back view, of their kids to be posted. Be sure to double check with parents that it is ok to take a photo. Make sure you get the names of the students for small group photos. Please send pictures to the Social Media Liaison and the field trip coordinator of the event to be posted on Instagram and Facebook, as well as the newsletter.
- Thank the families and venue when you leave to signal that Excel Academy's field trip time has ended, and the families are there on their own if they choose to stay. Text the community coordinator of the event when you leave.
- Turn in the collected waivers (one waiver for students, another for parents and non-students, including siblings and guests) to the office the next time you are there. There is no rush.

<u>Reimbursement for Driving</u>

All teachers will receive mileage reimbursement at the IRS published reimbursement rate, this will cover driving expenses related to your job as a Teacher of Record. Teachers will keep track and submit reimbursement for their mileage for all work-related drives, including learning period meetings via Paycom mileage tracker application. Please see mileage reimbursement policy for additional details.

All reimbursements are to be submitted via Paycom and submitted within two weeks (10 business days) of the end of the month for which reimbursements are being requested.

Special Education Department

Students with IEPs

Every student within the Special Education Department (SPED) has what is called an IEP, or Individualized Education Program. An IEP is a document and a map that lays out the program of special education instruction, supports and services a student requires in order to make progress toward grade level standards.

How do I know if I have a student receiving SPED services on my roster?

In the ToR's student roster in SIS, a variety of symbols may appear next to a student's name. If a dark blue star appears, this will indicate that the student has an IEP. The ToR will reach out to the parent and explain how our school works, following the initial phone call guidelines, just like any other student assigned to them. The parent will sign the ***Master Agreement and Acknowledgement of Responsibilities***, officially enrolling them in our school. If the parent of a newly enrolled SPED student poses questions to the ToR that they are unsure of the answer to, reach out to the SPED Intake Manager, Sondra Ryan, for further support.
For newly enrolled High School students, it is vital to collaborate with LaKeyshia Ono and the High School Counselors PRIOR to developing the student's MA.

****It is imperative that you inform the SPED Director, Lara Ulmer, within 24 hours** of the *Master Agreement* being signed. **This 24 hour notification is crucial so that the Special Education team can comply with all legal timelines for newly enrolled students. IEP services cannot begin until a signed MA is received.**

Once the MA is signed, an interim offer will be sent from the SPED Department to the parent/guardian and a 30 day IEP will be scheduled to finalize the student's IEP after a period of data gathering. *ToRs are required to participate in all portions of all IEP meetings for students on their roster, including the 30 day IEP.* At the IEP all team members will be expected to

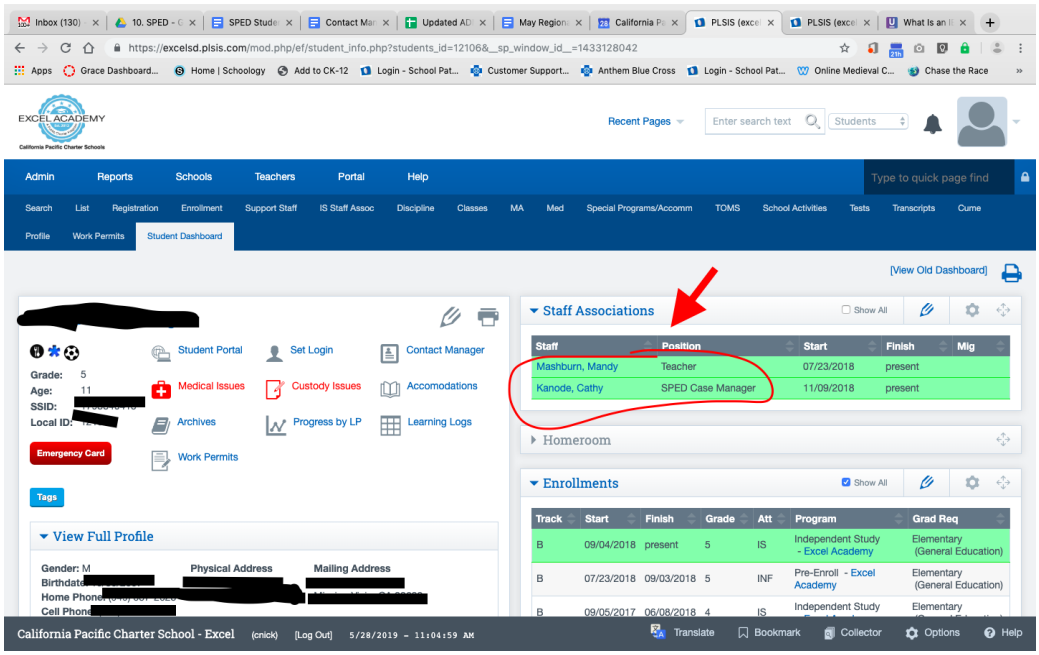
speak to the students academic present levels at the time of the meeting. ToRs are the experts in general education expectations and grade level standards at all IEP meetings. This means you will need to spend extra time getting to know the educational needs/strengths of any new students with IEPs assigned to your roster.

Any questions about a continuing student's IEP should be directed to the assigned Case Manager. The SPED Department Coordinator will be the temporary CM for all newly enrolled students until the 30 day IEP is complete and a permanent CM is assigned.

You can find your student's **Case Manager** within SIS/Pathways.

Find the Case Manager for Your Student:

- Click on the student name on your roster, which will take you to the student dashboard (see below).
- The circled names indicate the assigned teacher (yourself) and the case manager for the student.



Students with IEPs will be treated just like any other General Education student, ***except for any areas relating to their disability.***

For instance, if a student with an IEP does not attend/reschedule an LP meeting, they should receive a PIN. Please note that ToRs are NOT required to request permission from the student's CM or any other special education team member prior to issuing a PIN according to the policies and guidelines set by Excel Academy.

Please include the student's assigned case manager and SPED Program Specialist (Leah Vides) **once a student reaches their third** PIN so that the team can guide you through required

next steps and collaborate on strategies to best support the student. An IEP meeting is required specifically to discuss PIN concerns, per the EACS SPED PIN Policy.

Following issuance of the 3rd PIN, please continue to issue PINs to all students if necessary, and continue to notify the CM and Program Specialist as they accumulate.

*If you are ever in doubt about a student's needs, please reach out to their assigned case manager for more information.

Roles/responsibilities throughout the school year

Open communication with families during the year will assist in meaningful and fruitful IEP meetings. Prior to the first day of school, *the Case Managers will provide you with an "IEP at-a-glance" document for each student at the beginning of the school year and each time the IEP is updated throughout the year*. This document will provide you with a summary of the student's required disability accommodations, goals that are being addressed through the IEP, and the services currently being provided to address the goals. If you have any questions regarding the document or its contents, reach out to the CM.

Throughout the school year you will complete all your regularly assigned ToR duties for all students on your roster, including those with IEPs. However, for students with an IEP, you will have additional responsibilities.

For all students with IEPs on your roster:

- Read, review and be aware of changes to the student's IEP throughout the school year.
- Become familiar with each student's goal areas, service areas, accommodations and modifications. Accommodations and modifications are required to be implemented throughout all general education activities.
- The IEP is a legally-binding document that is active and in place ***every minute of every school day.*** Knowing and understanding it will support student progress and success!
- Communication, communication, communication! Regular communication throughout the year is crucial to a meaningful IEP process.
- Assist parents with the implementation of accommodations listed in the IEP (related to instruction and strategies.) Please consult with the assigned Case Manager as needed.
- If you believe you require the assistance of the CM either in preparation for or duringa LP meeting, please reach out to them well in advance. Once you have shared your concerns they will determine whether it is appropriate for them to accompany you to the LP meeting, or if a formal IEP meeting should be scheduled to address the concern with the entire team present. e.
- Collaborate with students' assigned Case Manager prior to report card completion for support with appropriate comment selection.
- Share all concerns related to special education with the student's assigned Case Manager immediately. The special education department is responsible for addressing many

parent concerns in a formal manner via IEP discussion. If a parent is expressing concerns or directing requests regarding their student's special education services to you; it is your responsibility to direct the parent to their CM.
***If you reach out to a CM to share a concern or request on behalf of a parent, and do not receive a response within 48 hours, please reach out to Leah Vides, Program Specialist, for further assistance.*

For some students on your roster:

- In conjunction with the assigned Case Manager or Special Education Coordinator, assist parents with implementation of modifications listed in the IEP
- Provide consultation or collaboration services as listed in the IEP

Roles/responsibilities in preparation for the IEP meeting

The Special Education Case Manager is responsible for scheduling the IEP meetings and will communicate options for dates and times with all members of the IEP team. Regularly anticipated IEP meetings will be scheduled at least one month prior to the meeting.

Note: Case managers will do their best ***not to*** schedule regular Plan Review and Eligibility Evaluations during LP meeting weeks. However, due to legal timelines or urgent circumstances, this cannot always be avoided.

General Education Feedback Form: This form will be located within the Shared Drive. In preparation for the IEP meeting you will need to complete it in its entirety.

- ***Please fill out every section of this form with current information that pertains to your student. You will need to add as much information as possible (1 or 2 sentences does not suffice) including most recent iReady and Statewide test scores if available.***
- Please remember you are the link to the parent who is doing the primary teaching and using the curriculum and the IEP. If you do not have the information to complete a particular section of the form, please reach out to the Case Manager for guidance. Gathering parent-reported information may be appropriate for some areas, however as the ToR you are expected to have a full understanding of the student's academic levels.
- Always indicate if the information was gathered via assessment, observation, work samples, parent report etc.

Role DURING the IEP meetings

As the ToR, you are the student's general education teacher of record and a legally required member of the IEP team. You are vital to the educational progress of students with IEPs and considered the general education expert for that student.

The general education teacher is expected to contribute to the IEP team process by obtaining and/or contributing to the team in the areas of:

- General Education curriculum and content.

- A student's performance and engagement within the Independent Study environment.
- A student's interactions with both their peers and parent/guardian.
- The pace at which a student's curriculum is being completed with mastery. Also, *how much reteaching is needed to maintain that mastery*.
- Relating general education assessment results, both formal and informal.
- A student's use of accommodations/modifications in their daily work.

The Case Managers will develop an agenda for each meeting so you know the sequence of topics, and when you will have the opportunity to speak. Throughout the meeting, the facilitator will ask if there are any questions and if certain team members are in agreement with the information being shared or recommendations being made. Please speak up and ask/answer questions throughout the meeting. The IEP requires input and consensus from all members of the team, and your voice is important! However, it is vital to remember that in all IEP meetings, the focus of all discussions and outcomes should be driven by student needs. IEPs are not developed or modified to meet the preferences of the parent or guardian.

Roles/responsibilities AFTER the IEP meeting

After the IEP meeting you will receive the IEP via docusign for your signature on the attendance portion of the consent page.

Please sign to confirm your participation in the meeting within 24 business hours so that all IEPs can be affirmed for compliance within the allotted timelines. You will be notified once the parent has provided consent to the IEP.

- If the parent contacts you after the IEP to express concerns or pose questions prior to providing their signature of consent, please immediately notify their case manager.
- The new IEP is in effect once consent is received and the IEP cycle will begin again. If any follow-up activities are required, you will be provided with this information.

Communication Protocol

Forms of Communication Used within Excel Academy:

- **Beehively:** This is the primary form of communication between both staff and families enrolled in Excel Academy. All important school wide announcements, opportunities, field trips, community events, registration sign ups, and other opportunities are posted

on this platform, and will notify parents via email or text message. It is important that every Teacher's Beehively page is set up and used regularly by Teachers. ToRs who do not use this platform do a disservice to their families, as parents often follow the lead of their Teachers, and may miss out on important announcements and opportunities by ignoring communications sent by the school via Beehively to families.

- **Email:** Email is the primary mode of communication between staff members, and for one on one communications between a Teacher and a Parent/Student. It is important that if a question can be answered in an email, the sender uses this option. There are two reasons for this:
  - Emails are a perfect way to document a conversation took place and to relocate the information if needed in the future
  - Everyone is extremely busy and cannot take the time to answer the phone when an email is sufficient
- **Phone:** The phone should be used if the situation or question would be hard to easily describe in an email. (example: a situation with a family is so long and convoluted that it would require multiple emails back and forth.) It should also be used in the event of an emergency situation. Of course, if someone needs medical attention, dial 911 first, but then contact an administrator to apprise them of the situation.
- **In-Person/Face-to-Face:** This form of communication is rare and will only occur during our Professional Development and Regional Meetings as well as some performance reviews or other critical meetings.

Any correspondence with a student ***must* include the parent/guardian. At no time should a ToR communicate solely with a student, unless you receive written permission from the parent/guardian.

Please Note: If sensitive information comes up in an email thread or you decide to call the individual(s) instead of continuing the thread, establish that a new form of communication will be taking place by writing something to the effect of: "I will give you a call to finish this discussion." That way, if you need to look back on the topic, you know that the conversation didn't fall through the cracks.

Please Follow the Guidelines Below:

Sender

- ***Only include those who need to know or respond to the communication***. Think through before sending. Refer to each department's Who Does What sheet if you are unsure of who to email.

- **Always "BCC" emails with large groups of people**.
  - **"bcc"** allows receivers to "reply" back to the sender *without including anyone else in the reply*. This cuts down on unnecessary replies of "thank you" to everyone.

- ➢ **"bcc"** allows for the *privacy of other receivers of the email*. **Always use "bcc" when parent email addresses are involved. This will not allow anyone to see the email addresses.**
- ➢ **"cc"** is used *when you do not need to hide the privacy of someone that is needed on the email*.
  - **Ex.** Email to Lorrie that you would like to also be seen by Salmeh in admissions, but the primary email is to Lorrie.

❖ **Title:** The title should **reflect what you are communicating in the email**. Start a new email, rather than bring up a topic not related to the email string. *Do not attach an important conversation to the bottom of an email chain that has nothing to do with the topic. Do not start a new email chain about a topic already being discussed.*

- ➢ **Ex:** A chain about a student not completing iReady:
  - Incorrect: "iReady"
  - Correct: "J. Smith Did Not Complete iReady"
  - Incorrect: "Idea"
  - Correct: "Idea for End of the Year Luncheon"

- ➢ **Ex:** The email chain above turns into a conversation about concern over J. Smith's grades
  - Correct: Start a new email with the title **"Question about Student Grades"** with the appropriate people attached
  - Incorrect: Continue the conversation with people that do not need to be on it in a chain that has a title that does not fit the topic

❖ **Follow-up protocol:** If you do not receive a response **within 48 business hours**, you may send a follow-up email.

❖ **Urgent Emails:** Emails that must be handled immediately due to time sensitivity. *After 4 hours, you may follow up the email with another email and phone call.*

- ➢ If your request is Urgent, the title should include the word **Urgent** at the beginning, with the meaningful title following.
  - Ex. ***Urgent: Concerning Student Conduct***
- ➢ Urgent Emails should be answered **within 4 hours** during office hours (8:30-4:30)

*****What emails should be considered urgent?***

SPED Testing Request, time sensitive SPED situations, Reports of Self-Harm, Emotional Distress, Abuse, Emergencies, etc.

*****What emails should NOT be considered urgent?***

Work permits, concurrent enrollment forms, enrollment or withdrawal of a student, general IEP questions, attendance questions (unless you are Cori or Keri), etc. All aforementioned items have a process in place to review such requests.

- **DNR:** (Do Not Reply) Emails that are Informational Only and Do Not need a response:
  - Title the email with DNR and then the title
    - Example: ***DNR: Finished Editing the Safety Plan***

- **PR**: (Please Reply)
  - Emails in which you need a simple confirmation from the receiver of "Got It" or "Okay" in order to know they reviewed it and understand the contents
    - Ex. ***PR: New Guidelines Attached***

- **AR:** (Action Required)
  - Emails that require an action to be taken [i.e. surveys, student request, inputting payroll numbers, etc.
    - Ex. ***AR: Roster Requests for 2019/20 School Year***

Receiver

- Do NOT respond to emails with DNR
- Do reply to PR emails with a "Received" or other acknowledgment of receipt
- Complete the action of AR emails within a timely manner
- If a sender accidentally sends an all staff email via CC rather than BCC, do NOT "reply all" to it. This adds unnecessary emails to everyone on the email.
- Reply to all emails within 24 hours and all urgent emails within 4 hours

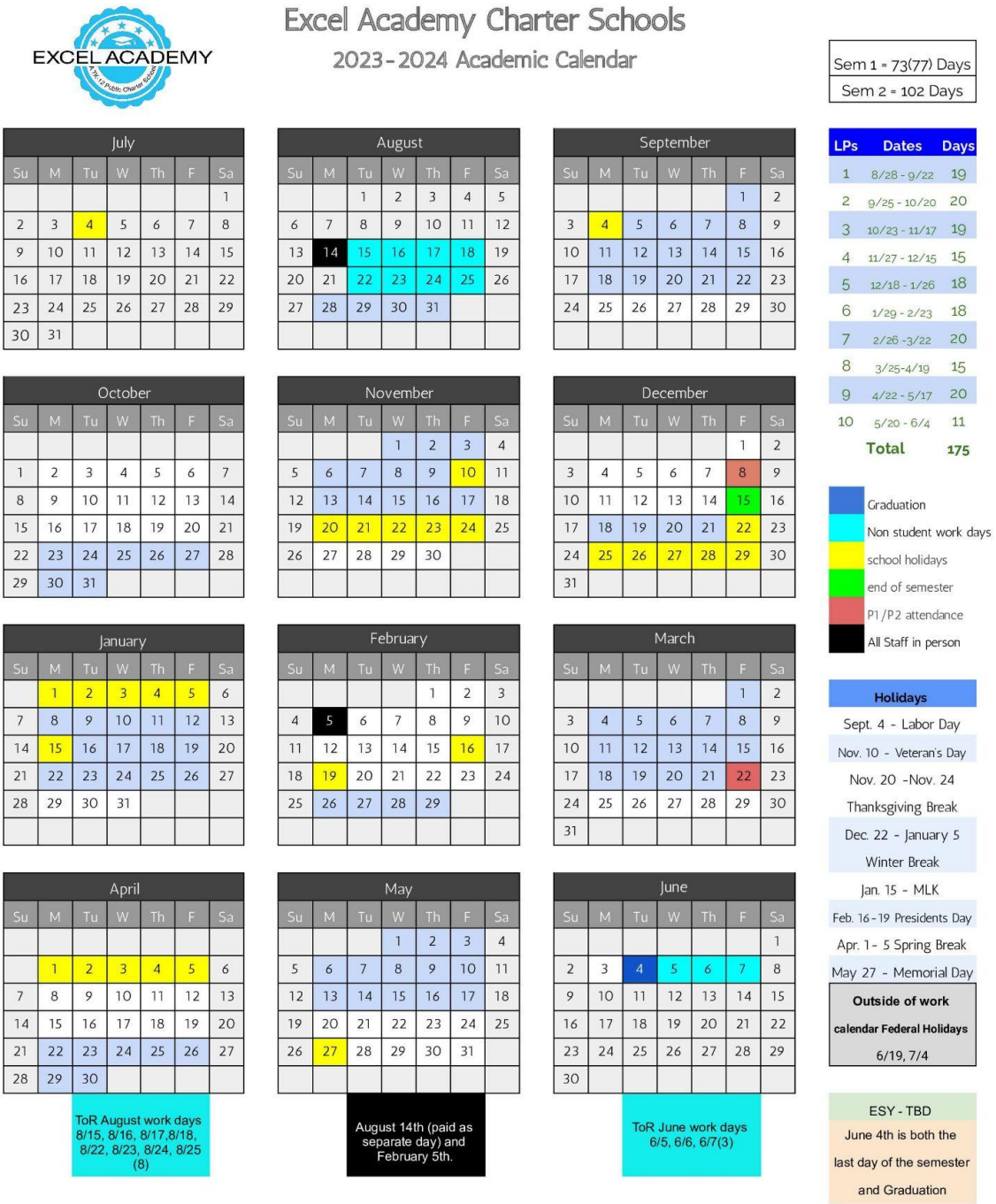
Things to Avoid:

- Do not use ALL CAPS, as it can be construed as anger or yelling.
- Always read through and soften up anything that could be taken in the wrong way.

Staff Resources

Policy Organizer
Comprehensive Safety Plan
Frequently Used Excel Websites for Families
Staff Directory
IT Request Form

Calendar


Excel Academy Charter Schools
2023-2024 Academic Calendar
Sem 1 = 73(77) Days
Sem 2 = 102 Days
July
August
September
October
November
December
January
February
March
April
May
June
LPs Dates Days
1 8/28 - 9/22 19
2 9/25 - 10/20 20
3 10/23 - 11/17 19
4 11/27 - 12/15 15
5 12/18 - 1/26 18
6 1/29 - 2/23 18
7 2/26 -3/22 20
8 3/25-4/19 15
9 4/22 - 5/17 20
10 5/20 - 6/4 11
Total 175
Graduation
Non student work days
school holidays
end of semester
P1/P2 attendance
All Staff in person
Holidays
Sept. 4 - Labor Day
Nov. 10 - Veteran's Day
Nov. 20 -Nov. 24 Thanksgiving Break
Dec. 22 - January 5 Winter Break
Jan. 15 - MLK
Feb. 16-19 Presidents Day
Apr. 1- 5 Spring Break
May 27 - Memorial Day
Outside of work calendar Federal Holidays 6/19, 7/4
ESY - TBD
June 4th is both the last day of the semester and Graduation
ToR August work days 8/15, 8/16, 8/17,8/18, 8/22, 8/23, 8/24, 8/25 (8)
August 14th (paid as separate day) and February 5th.
ToR June work days 6/5, 6/6, 6/7(3)

Coversheet

Consent Items - Policy Development

Section: XI. Consent
Item: D. Consent Items - Policy Development
Purpose: Vote
Submitted by:
Related Material: EACS BUS Consent - Board Policies - June.pdf

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item: **Date:** June 15, 2023

	Business/Financial Services
X	Consent Agenda
	Correspondence/Proposals/Reports
	Curriculum
	Education/Student Services
	Organizational Structure of the Board
	Personnel Services
X	Policy Development
	Public Hearing

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

Background:
In order to ensure adherence with State and federal laws, it is recommended the Board approve the following policies as presented.

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

3000 Series - Business/Non-instructional

3000 - EA Fiscal Control Policy - Overview
- Added “Fund Balance” section
- Added “Reserve Balance” section

3005 - EA Fiscal Control Policy - Purchasing
- Increased the purchase amount that the Executive Director can approve prior to board approval from $5,000 to $20,000
- Removed IEP specific purchase requirements
- Added language regarding fiduciary responsibility of the Board and Executive Director
- Added language regarding the process of determining effective purchasing procedures and ensuring availability of funds in the budget prior to making purchases
- Moved paragraph regarding personal fund usage to Contracts of Service

- Added additional information in the Contracts for Service section to provide more information regarding school procedures for contracts
- Removed Purchase Cards section, as it is no longer relevant

5000 Series - Student Services

5000 - EA Concepts and Roles

- This policy is being renumbered to 9000, as it is more directed towards the Board of Directors rather than students.

5045 - EA Acceptable Use Policy

- Added "EACS has deemed certain uses of the Internet inappropriate for an educational setting and therefore not appropriate for use with EACS equipment and resource networks. EACS stresses that an inappropriate use does not always mean that the use is in itself "bad" or illegal, but only that the use does not further the educational goals and purposes of EACS."
- Replaced "Internet/Computer Agreement" language with Technology Lease Agreement
- Added information regarding technology protection measures
- Added "intimidation, cyberbullying, and threats" to the list of forms of misuse of technology
- Added "plagiarism," "bullying," "cybersexual bullying," "on any messaging platform," and "Using the school funded Internet/computer system to arrange a face-to-face meeting with someone he or she has "met" on the computer network or Internet without a parent's written permission" to the list of unacceptable behavior.
- Added "Revocation of school issued email account" to list of consequences of non-compliance.
- Added paragraphs on procedures following a violation of the policy, including training of students.

5110 - EA Cellphones & Other Electronic Signaling Devices Policy

- Removed "Smartphones and pagers" from title and throughout the policy, to keep relevancy and to eliminate redundancy.
- Added "as deemed necessary by Administration" to school activities.
- Replaced "sponsored activity" with "community events or field trips.
- Removed "occurring before or after the regular school day," as it does not pertain to EACS' model.
- Replaced "off" with "on silent" regarding when private devices are not to be used.
- Added "as deemed unnecessary by Administration" to school activities wherein private devices are not to be used.
- Added section regarding school employees who take possession of a student's personal property, and how to secure the property appropriately.
- Added Safety Precautions section.

6000 Series - Instruction

6035 - EA Mathematics Placement Policy

- Added grade level qualifications to follow the junior high - 7th and 8th grade level mathematics course placement policy.

6116 - EA Discipline and Involuntary Withdrawal Policy

- Replaced “suspects” with “concludes” when an area is identified for improvement.
- Replaced “in lieu of” with “conjunction with” for students to have both an Attendance Intervention Meeting and 504 meeting to service both needs.
- Added information regarding students with IEPs after an Attendance Intervention Meeting in the Third Progress Improvement Notification (PIN) - Internal Evaluation section.
- Replaced “involuntary withdrawal” with “immediate expulsion” when referring to violations that could result in an action.

Final Clean Versions of Revised Policies:	**Redline Versions of Revised Policies:**
3000	3000
3005	3005
5045	5045
5110	5110
5000/9000	5000/9000
6035	6035
6116	6116

REVIEWED

The following are current policies that have been reviewed but have not needed any changes.

5010	EA Educational Records and Student Info
5015	EA Title IX
5020	EA Comprehensive Self-Harm/Suicide Prevention
5030	EA Immunization Policy
5035	EA Student Freedom of Speech and Expression
5070	EA Transgender and Gender Nonconforming Student Nondiscrimination Policy
5085	EA Communicable, Contagious, or Infectious Diseases
5105	EA Direct Instruction and Supplemental/Administrative Support Policy
6010	EA Independent Study Policy
6015	EA CHYA: California Healthy Youth Act Policy Letter
6020	EA Education for Homeless Children
6025	EA 504 Policy
6030	EA Education for Foster Youth
6065	EA SPED Pin Process for Missed Services
6070	EA SPED Independent Educational Evaluations
6075	EA SPED Certificate of Completion
6200	EA AB130 Satisfactory Educational Progress Policy

Coversheet

Approval of Additional Chromebooks Purchase

Section: XII. Business/Financial Services
Item: A. Approval of Additional Chromebooks Purchase
Purpose: Vote
Submitted by:
Related Material:
Excel Academy Charter School-(350)HP Chromebook 11 G9 Touchscreen Intel N5100 8GB RAM 64GB eMMC #78576.pdf

BACKGROUND:

In light of the current circumstances, it has become evident that the Chromebooks utilized by our students have reached a state of obsolescence, rendering them inadequate for optimal student use. With approximately 1,043 Chromebooks at hand, it has become imperative to address this issue by procuring suitable replacements. Nonetheless, considering our financial limitations, the staff strongly advocates for a prudent and sustainable approach by implementing a five-year replacement program. This approach will help us align with our annual budgetary constraints.

For the upcoming fiscal year, 2023-24, it is recommended that we acquire 350 new Chromebooks, specifically for students in grades 3 and 4. This strategic investment is estimated to amount to approximately $143,500. By adopting this course of action, we will not only address the pressing need for updated technology but also ensure that the associated costs are manageable and within our budgetary framework.

This purchase will be charged to the Expanded Learning Opportunities Grant (Resource number 7425).

AREY JONES EDUCATIONAL SOLUTIONS

1055 6th Ave #101
San Diego, California 92101

(800) 998-9199

HP Chromebook 11 G9 11.6" Touchscreen Intel Celeron N5100 8GB RAM 64GB eMMC 1 Year Warranty

Description		Qty	Unit Price	Ext. Price	Tax
6J173UT#ABA	**HP Chromebook 11 G9 EE 11.6" Touchscreen Chromebook - HD - 1366 x 768 - Intel Celeron N5100 Quad-core (4 Core) 1.10 GHz - 8 GB Total RAM - 64 GB Flash Memory**	350	$333.40	$116,690.00	Y
CROS-SW-DIS-EDU	**Google Chrome Education Upgrade**	350	$30.00	$10,500.00	Y
EWRFL14	**eWaste: more than 4 inches, less than 15 inches**	350	$4.00	$1,400.00	N
4TA21AA	**Chromebook Google Enrollment Integration Services**	350	$5.50	$1,925.00	N
4TA23AA	**Chromebook Asset Tag**	350	$1.00	$350.00	N

Price Subtotal: **$130,865.00**

1055 6th Ave #101
San Diego, California 92101

(800) 998-9199

Excel Academy Charter School-(350)HP Chromebook 11 G9 Touchscreen Intel N5100 8GB RAM 64GB eMMC #78576

Prepared by:

Arey Jones Educational Solutions

Chris Chukwuocha
800-998-9199
chris.chukwuocha@areyjones.com
Contract:
HP WSCA CA NASPO MNNVP-133
HP WSCA CA HP NASPO

Prepared for:

Excel Academy Charter School

,
Nicole Tanner

ntanner@excelacademy.education

Quote Information:

Quote # 078576.1

Quote Date: 05/31/2023
Expiration Date: 06/30/2023
Product Category:

Quote Summary

Description	Amount
HP Chromebook 11 G9 11.6" Touchscreen Intel Celeron N5100 8GB RAM 64GB eMMC 1 Year Warranty	$130,865.00

Non-taxable Subtotal:	**$3,675.00**
Taxable Subtotal:	**$127,190.00**
Grand Subtotal:	**$130,865.00**
Estimated Tax:	**$9,857.23**
Grand Total:	**$140,722.23**

Coversheet

Approval of Macbook Laptop Purchase for Staff

Section: XII. Business/Financial Services
Item: B. Approval of Macbook Laptop Purchase for Staff
Purpose: Vote
Submitted by:
Related Material: Macbook laptop quote.pdf

BACKGROUND:

As the staff at Excel Academy continues their service at the school, their work appointed laptops reach their expiration date after a period of about five years, and cease to function properly. As such, it's vital that Excel Academy provide its staff with properly working laptops as they continue to work remotely. Excel Academy is in need of purchasing 30 new MacBook Air laptops for our staff, to replace their currently expired laptops.

Apple Store for Education Institution

Proposal

Proposal Number

2111209628

Account Number/Name

1040393

EXCEL ACADEMY CHARTER SCHOOLS

Created On

05/23/2023

Created By

Kimberley Venegas

Thank you for creating your proposal, details are provided below. You can access this proposal from your Apple Store for Education Institution by searching proposal number 2111209628.

Item	Product / Description	Total Quantity	Unit Price	Total Price
1	Z124 13-inch MacBook Air - Space Gray Specifications • System on Chip (SoC): Apple M1 chip with 8-core CPU, 7-core GPU and 16-core Neural Engine • Memory: 16GB unified memory • Storage: 256GB SSD storage • Input: Touch ID • Thunderbolt: Two Thunderbolt / USB 4 ports • Trackpad: Force Touch trackpad • Display: Retina display with True Tone • Pro Apps: None • Logic Pro: None • Keyboard Language: Backlit Magic Keyboard with Touch ID - US English • COUNTRY KIT: Accessory Kit	30	1,079.00 Recycle Fee	32,370.00 USD 120.00 USD
2	S8244LL/A 3-Year AppleCare+ for Schools - MacBook Air (no service fees)	30	149.00	4,470.00 USD

Subtotal	36,960.00 USD
Estimated Tax	2,508.68 USD
Total	39,468.68 USD

Please note that your order subtotal does not include sales tax or rebates. Sales tax and rebates, if applicable, will be added when your order is processed. Your order total may include estimated sales tax that is subject to change at the time your order is processed.

How to Order

If you would like to convert this Proposal to an order, log into your Apple Store for Education Institution and select 'Proposal' from the pull-down menu. Search for this Proposal by entering the Proposal Number referenced above.

Note: A Purchaser login is required to order. Visit your Apple Store for Education Institution to login or create your Purchaser Apple ID.

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Coversheet

Approval of the One-Time Bonus for Universal Pre-Kindergarten (UPK) Teachers for 2023-24

Section: XIII. Personnel Services
Item: A. Approval of the One-Time Bonus for Universal Pre-Kindergarten (UPK) Teachers for 2023-24
Purpose: Vote
Submitted by:
Related Material: One-time Bonus for UPK Teachers.docx.pdf

BACKGROUND:

The vision of Universal Pre-Kindergarten is to resolve this issue, providing equitable access to programs for all 4-year-olds, without regard to income. The state of California is devoting the funds to train staff and prepare school facilities in order to give our children equitable access to quality teachers and programs.

Options for meeting Transitional Kindergarten Requirements

https://drive.google.com/file/d/1Ug8X1nmhiQoDWV_szJTrCIw1kQQiX4XR/view

RECOMMENDATION:

It is recommended the Board approve the One-Time Bonus for Universal Pre-Kindergarten (UPK) Teachers 2023-24. Universal PreKindergarten compliant teachers will be eligible and meet state requirements to guide Transitional Kindergarten grade level students. This compliance can be met in a variety of ways including current experience with transitional kindergarten grade level students and early childhood development units.

Agenda Item: **Date:** June 15, 2023

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

Item Requires Board Action: X___ **Item is for Information Only:** ____

Item: Approval for the One-Time Bonus for Universal Pre-Kindergarten (UPK) Teachers 2023-24

Background: The vision of Universal PreKindergarten is to resolve this issue, providing equitable access to programs for all 4-year-olds, without regard to income. The state of California is devoting the funds to train staff and prepare school facilities in order to give our children equitable access to quality teachers and programs.

Options for meeting Transitional Kindergarten Requirements
https://drive.google.com/file/d/1Ug8X1nmhiQoDWV_szJTrCIw1kQQiX4XR/view

ID#	Name	Fulfilled Requirement	Support for Meeting UPK Compliance	Fiscal
A05C	Hannah Cho	Option 2 Child Development Coursework	Developmental Psychology; Principles and Practices; Socialization/CH; Observations/CH (12+ units) 3 years TK experience with Excel Transcripts	$3,000.00
A0R2	Kim Damato	Option 2 Child Development Coursework	2 years prior teaching experience in the classroom in addition to Excel experience Resume	$3,000.00

A07T	Diane Geier	Option 1 Child Development Site Supervisor Permit (School Age Emphasis)	Child Development Major/24+ units Transcripts	$3,000.00
A0B9	Esther Kim	Grandfather Clause TK Experience on or before 7/1/2015	Resume	$3,000.00
A0J8	Karen Ottoson	Option 1 Child Development Site Supervisor Permit (School Age Emphasis)	24 + Child Development Units Human Development Major 1 year preschool experience Transcripts Resume	$3,000.00
A0QE	Julie Vasquez	Grandfather Clause TK Experience on or before 7/1/2015	Resume	$3,000.00
A03U	Andrea Lowe	Option 2 Child Development Coursework	Child Development; Child Psych; Exploring Child Behavior, Proctorship Child Development; Exceptional Child Transcripts	$3,000.00

Fiscal Impact: $21,000

Recommendation:

It is recommended the Board approve the One-Time Bonus for Universal Pre-Kindergarten (UPK) Teachers 2023-24. Universal PreKindergarten compliant teachers will be eligible and meet state requirements to guide Transitional Kindergarten grade level students. This compliance can be met in a variety of ways including current experience with transitional kindergarten grade level students and early childhood development units.

Coversheet

Approval of CharterLIFE Benefits (Renewal)

Section: XIII. Personnel Services
Item: B. Approval of CharterLIFE Benefits (Renewal)
Purpose: Vote
Submitted by:
Related Material:
2023_Renewal_Comparison_2089_Excel_Academy_Charter_School_final_DJ may 5.pdf
CharterLIFE overview.pdf
2023-2024 Benefits Presentation.pdf

BACKGROUND:

The following item is the 2023-2024 Excel Academy Charter School health and welfare renewal and open enrollment information. Excel Academy will continue its partnership with CharterLIFE and BRMS as health broker and administrator for the 2023-2024 school year. Overall renewal premiums experienced a .90-8% increase due to general standard marketplace increase and post pandemic submission of claims. Excel Academy Charter School strives to provide competitive rich benefit packages to our staff and will continue in the process of annual analysis and review.

Submit Renewal Acceptance/Enrollment To: BRMS

Secure Email: CharterLIFE@brmsonline.com

Phone: 866.755.6651 (option 2)

Fax: 916.467.1404

Customer ID: Vbas #2089

2023 Excel Academy Charter School Renewal Comparison

CharterLIFE™ Renewal Rates 2023				SC											
Tier	**BC EPO High**	**BC EPO Low**	**BC EPO Base**	**BC PPO High**	**BC PPO Low**	**BC PPO Base**	**Kaiser HMO High**	**Kaiser HMO Low**	**Kaiser HMO HDP $1500**	**Kaiser HMO HRA $3000**	**Dental PPO 2000**	**Dental PPO 1000**	**DeltaCare HMO**	**VSP VISION**	**Life 25,000**	**Life 50,000**
Employee Only	$674.67	$633.10	$586.50	$1,144.03	$1,052.74	$819.02	$762.92	$705.22	$617.02	$495.82	$56.05	$46.84	$14.15	$9.47		
Employee+1							$1,525.84	$1,410.44	$1,234.03	$991.64	$108.10	$91.12	$26.98	$18.72	$2.68	$5.37
EE + Sp	$1,484.28	$1,392.82	$1,290.30	$2,516.88	$2,316.05	$1,801.82										
EE + Chld/ren	$1,214.41	$1,139.57	$1,055.72	$2,059.27	$1,894.95	$1,474.23										
Family	$2,091.13	$1,962.61	$1,818.17	$3,546.51	$3,263.52	$2,538.95	$2,159.08	$1,995.81	$1,746.17	$1,403.17	$180.01	$149.56	$43.50	$30.66	-	123
Total EE's	-	25	-	17	5	-	12	17	-	-		54	21	69		

Tier	**BC EPO High**	**BC EPO Low**	**BC EPO Base**	**BC PPO High**	**BC PPO Low**	**BC PPO Base**	**Kaiser HMO High**	**Kaiser HMO Low**	**Kaiser HMO HDP $1500**	**Kaiser HMO HRA $3000**	**Dental PPO 2000**	**Dental PPO 1000**	**DeltaCare HMO**	**VSP VISION**	**Life 25,000**	**Life 50,000**
Employee Only		2		15	2		6	2				10	4	18		
Employee+1							4	4				14	5	14		
EE + Sp		1		0	1											123
EE + Chld/ren		18		0	2											
Family		4		2	0		2	11				30	12	37		
Total EE's		25		17	5		12	17				54	21	69		123
Monthly		$ 33,275.91		$ 25,643.94	$ 8,950.89		$ 11,646.53	$ 26,578.47				$ 6,556.82	$ 701.36	$ 1,635.48		$ 671.24
Monthly New		**$ 31,021.72**	**$ -**	**$ 24,253.47**	**$ 8,211.43**	**$ -**	**$ 14,999.04**	**$ 29,006.11**				**$ 6,230.88**	**$ 713.50**	**$ 1,566.96**	**$ -**	**$ 660.50**
Annual		$ 399,310.92	$ -	$ 307,727.28	$ 107,410.68	$ -	$ 139,758.36	$ 318,941.64				$ 78,681.84	$ 8,416.32	$ 19,625.76	$ -	$ 8,054.88
Annual New		**$ 372,260.64**	**$ -**	**$ 291,041.64**	**$ 98,537.16**	**$ -**	**$ 179,988.48**	**$ 348,073.32**				**$ 74,770.56**	**$ 8,562.00**	**$ 18,803.52**	**$ -**	**$ 7,925.97**
Change (+/-) %		**-6.77%**		**-5.42%**	**-8.26%**		**28.79%**	**9.13%**				**-4.97%**	**1.73%**	**-4.19%**		**-1.60%**

*some figures may be rounded up/down and/or pending final approval for this presentation, please refer to your bill for the exact cost.

** Cobra participants are not included in this representation of your renewal

** Voluntary Benefits participants are not included in this representation of your

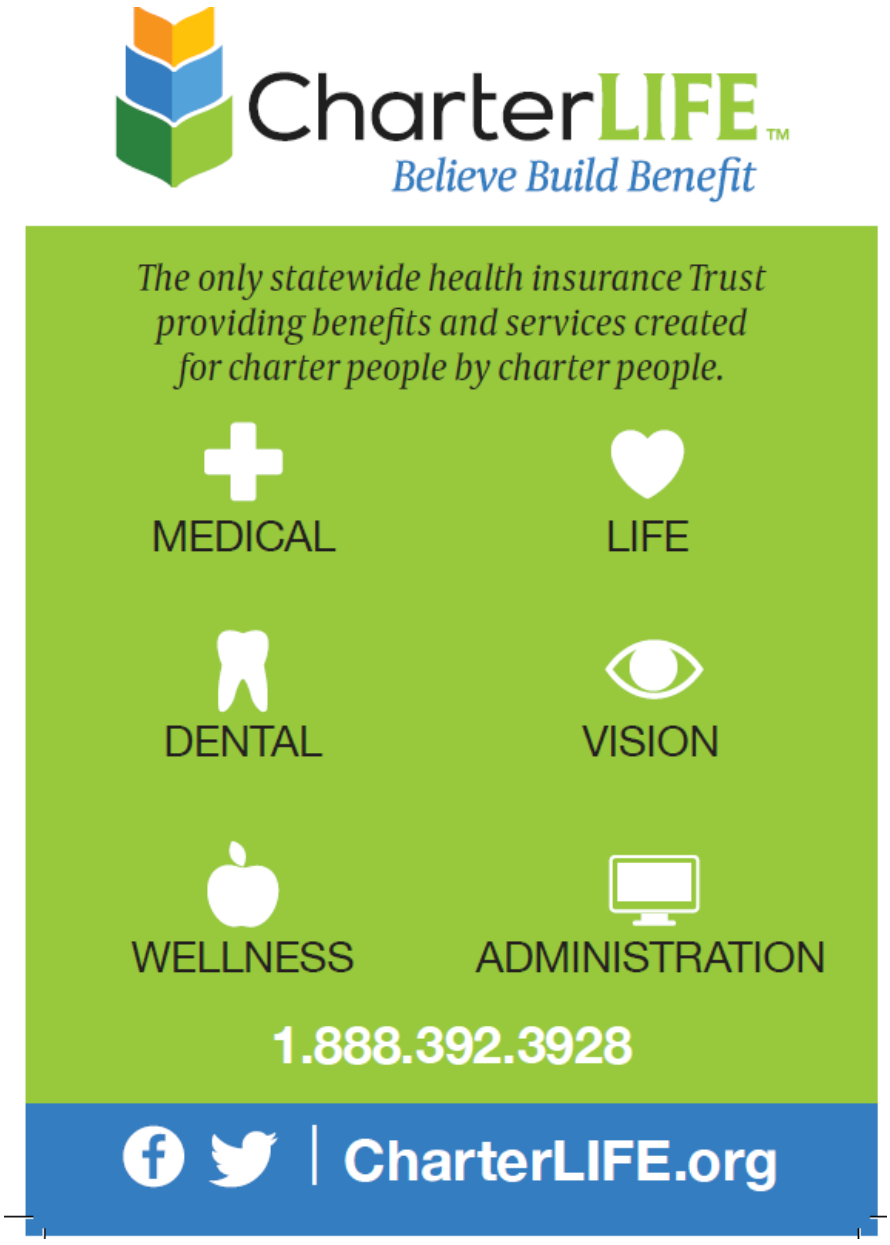
Premium Summary		CURRENT	RENEWAL
Monthly Premium*		$115,660.64	$116,663.61
Annual Premium*		$1,387,927.68	**$1,399,963.29**
Monthly Increase*			**$1,002.97**
Annual Increase*			**$12,035.61**
Increase %			**0.87%**

CharterLIFE™

Administered by: Benefit & Risk Management Services, Inc. PO BOX 2080, Folsom, CA 95630
Secure Email: CharterLIFE@brmsonline.com **Phone:** 866.755.6651 (option 2) **Fax:** 916.467.1404

CharterLIFE™ - In Partnership with Dickerson Employee Benefits License# OF69768

Excel Academy Charter School



CharterLIFE Benefit Information Guide (C-BIG)

SC 2022

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INTRODUCTION

WELCOME TO CharterLIFE!

We would like to extend a warm welcome, from the CharterLIFE team to you and yours! This CharterLIFE Benefit Information Guide (C-BIG) is created just for you.

As a valued employee of Excel Academy Charter School, we strive to provide you with timely and thorough member service from start to finish.

Please take the time to read through this guide so that you have a clear understanding of the benefits and services available to you as a CharterLIFE member.

You will find a helpful Contact List on page three, as well as a My health Benefits user reference guide, and much, much more! So…Let's get started!

CONTACT LIST

CharterLIFE Believe Build Benefit

Medical Anthem Blue Cross	Phone	Website
Member Services Eligibility, Claims, Provider Check, etc.	866-755-6671 (EPO/PPO)	www.myhealthbenfits.com
Optum Rx	844-568-2145	www.optumrx.com

Medical Kaiser Permanente	Phone	Website
Member Services Eligibility, Claims, Appointment, etc.	800-464-4000	kp.kaiserpermanente.org

Dental Delta Dental	Phone	Website
Member Services	800-422-4234 (HMO) 800-765-6003 (PPO)	www.deltadentalins.com
Billing and Enrollment	800-632-8555	CharterLIFE@brmsonline.com

Vision VSP	Phone	Website
Member Services, Eligibility, Claims, etc.	800-877-7195	www.vsp.com

Life/AD&D/Supplemental Life EAP/Travel Assistance - Unum	Phone	Website
Customer Services	800-421-0344	www.unum.com
Claim Address	The Benefits Center P.O. Box 100158 Columbia, SC 29202-3158 1-800-445-0402	

CharterLIFE Direct	Phone	Website/Email
CharterLIFE Direct	888-392-3928	Info@CharterLIFE.org

Colonial Life - Voluntary Benefits	Phone	Website/Email
Chad Frazier	866-755-6651 (opt.1)	CharterLIFE@brmsonline.com

CharterLIFE Member Services (BRMS)	Phone	Website/Email
CharterLIFE Member Services (BRMS)	866-755-6651	CharterLIFE@brmsonline.com

School HR Representative	Phone	Website/Email
Megan Anderson	714-336-4220	manderson@excelacademy.education

CharterLIFE Account Manager	Phone	Website/Email
Damon Johnson	818.400.6171	Djohnson@charterlife.org

ENROLLING IN YOUR BENEFITS

CharterLIFE Believe Build Benefit

Who is Eligible?

Full-time, regular employees who work at least 30 hours per week are considered benefit eligible. (subject to Excel Academy Charter Schools' eligibility guidelines).

You may also enroll your eligible dependent(s) in the plan(s). Your eligible dependents include:
- Your legal spouse
- Your registered domestic partner defined as same sex partners, who are both at least 18 yrs of age and opposite sex partners when one or both partners are over the age of 62.
- Your dependent children/step-children or children of your domestic partner whom you support up to age 26 (unless they can be enrolled in another group plan).

When You Can Enroll:

The plan year for CharterLIFE begins January 1st and ends December 31st.
- If you are a new hire, you should enroll within 30 days from your date of hire for your benefits to be effective the 1st of the month following your charter schools applicable waiting period.
- If you are an existing employee, you can enroll/make changes during the open enrollment period.
- If you are an existing employee who experiences a qualifying event, you can enroll/make changes at the time of the event as long as you notify Human Resources within 30 days (60 days for losing or gaining eligibility for Medicaid or state children's health plan).

How To Enroll:

Your enrollment will be processed online using the enrollment system, My Health Benefits. For help in navigating the system, you can reference the My Health Benefits Employee Self Service Quick Reference page following this page, contact your HR representative listed in the Contacts on page three of this guide, email CharterLIFE member services at CharterLIFE@brmsonline.com or call 1.866.755.6651 before the effective date of coverage.

Your Special Enrollment Rights

Your enrollment in the medical, dental, and vision or declination of coverage when you are first eligible will remain in place unless you have a qualifying life event (or until the next annual open enrollment if applicable).

Examples of Qualifying Events:

- Marriage
- Divorce
- Legal separation
- Death of a dependent
- Birth or adoption of a child
- Change in your/your spouse's/domestic partner's employment status
- Loss of coverage under Medicaid or state child health plan
- Gaining eligibility for coverage under Medicaid or a state child health plan

brms
Benefit Enrollment Guide

MyHealthBenefits™ Reference Guide

A BRMS Solution

With MyHealthBenefits, you're able to do much more than enroll in benefits. The platform allows you to add or remove dependents, modify beneficiary designations and access a comprehensive resource library with important information about your plan.

After the open enrollment period, the system is available year-round to check your benefit information or record a family status change. This reference guide will help you log into your benefits system and walk you through the enrollment process. Let's get started!

LOGGING IN

1. In your web browser, enter www.myhealthbenefits.com.
2. You will be directed to the benefits system login page. All users will be required to go through the registration process to create a new username and password.
3. To register for an account, click Create New Account. If you have already registered for a new account, skip steps 4-5.
4. Complete the registration process. You will be required to validate your account with an active email address.
5. Once your email address has been validated, your account has been successfully created. Click Log In to enter your account.
6. Enter your username and password, and the system will prompt you to validate your identity by entering a code (sent via phone call, text message or email). This second step in the authentication process will be required every time an attempt to

ENROLLING IN BENEFITS

1. On your benefit's dashboard, click Open Enrollment.
2. Before you begin your enrollment, you will be asked to verify your personal information. To begin the verification process, click Get Started.
3. When you have finished the verification process, click Proceed to Open Enrollment to begin enrolling in benefits.
4. Starting with your first Benefit Election, Vbas will guide you through the election process for all benefit types available to you.
5. Click the appropriate option/link that indicates the action you want to take for each benefit type available to you. If you want to change any of your elections, click I would like to change my election. When making changes, use the Next and Back buttons to move from page to page. If you make changes, be sure to click Save after making each change.
6. If you are satisfied with your elections, click the red button labeled Click here to submit your elections

MEDICAL PLAN HIGHLIGHTS

CharterLIFE Believe Build Benefit

Kaiser HMO MEDICAL PLANS

HMO (Health Maintenance Organization)

This is a type of plan in which medical costs are controlled by limiting services to a specific network of hospitals, doctors, other providers and usually by requiring referral by a primary-care physician for specialty care.

You have High and Low HMO plan options with Kaiser – High and Low. Please note that you are not allowed to change the plan in the middle of the plan year unless you experience a Qualifying Life Event. For more information, please refer to page two: Enrolling In Your Benefits. You can change the plan only during the open enrollment period.

2022 KAISER Benefit Comparison

HMO Medical Benefits			
HMO		**Kaiser High $10**	**Kaiser Low $20**
Benefits			
Annual Deductible	**Employee**	**None**	**None**
	Family	**None**	**None**
Out of Pocket Maximum*	**Employee**	**$1,500**	**$1,500**
	Family	**$3,000**	**$3,000**
Office Visit /Specialist**		**$10**	**$20**
Lab & X-Rays~		No Charge	No Charge
Inpatient Hospital		No Charge	$250 per admit
Outpatient (Surgery Services)		$10	$20
Rehabilitative/Chiropractic^^		$15 / 30 visits	$15 / 30 visits
Urgent Care		$10*	$20*
Emergency Room+		$150	$150
Prescription Drugs			
Tier 1- Generic		Generic: 1a:$10/1b:$20	Generic:1a:$15/1b:$30
Tier 2- Preferred Brand		Formulary Brand:1a:$25/1b:$50	Formulary Brand: 1a:$30/1b:$60
Tier 3 - Non- Preferred		N/A	N/A
Tier 4 - Specialty Drugs*		20% Coinsurance (not to exceed $150)	20% Coinsurance (not to exceed $200)
Annual Rx Deductible		None	None

*All copayments for prescription drugs and prescription drug deductible amounts, when applicable, will apply to the Out of Pocket Maximum. **Preventive Services covered at 100%. ~If available through and authorized by medical group. ^^Additional co-pays and/or coinsurance may apply depending upon rendered services. +If you are admitted directly to the hospital as an inpatient for covered Services, you will pay the inpatient Cost Share instead of the Emergency Department Cost Share. The information presented in this chart is a summary only. For a complete understanding of benefits refer to Evidence of Coverage (EOC). Rates are subjected to specific guidelines and terms.

Email: info@CharterLIFE.org **Call:** 888.392.3928 **Or visit us at:** www.CharterLIFE.org

Administered by: Benefit & Risk Management Services, Inc. **Address:** PO Box 2080, Folsom, CA 95630

Secure Email: CharterLIFE@brmsonline.com **Phone:** 866.755.6651 **Fax:** 855.392.3939

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MEDICAL PLAN HIGHLIGHTS

CharterLIFE
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Anthem EPO MEDICAL PLANS

EPO (Exclusive Provider Options)

You have one EPO plan option with Anthem – EPO Low. Please note that you are not allowed to change the plan in the middle of the plan year unless you experience a Qualifying Life Event. For more information, please refer to page two: Enrolling in Your Benefits. You can change the plan only during the open enrollment period.

EPO Medical Benefits		
EPO		**Anthem Low^ $30/$40**
Benefits		
Annual Deductible	**Employee**	**None**
	Family	**None**
Out of Pocket Maximum*	**Employee**	**$2,500**
	Family	**$5,000**
Office Visit /Specialist**		**$30 / $40**
Lab & X-Rays~		No Charge
Inpatient Hospital		$500 per admit
Outpatient (Surgery Services)		$250 per admit
Rehabilitative/Chiropractic^^		$30
Urgent Care		$30
Emergency Room		$100 (waived if admitted)
Prescription Drugs		
Tier 1- Generic		1a: $5/1b:$15
Tier 2- Preferred Brand		$25
Tier 3 - Non- Preferred		$45
Tier 4 - Specialty Drugs*		30% Coinsurance (not to exceed $250)
Annual Rx Deductible		Ind: $150; Fam: $450

*All copayments for prescription drugs and prescription drug deductible amounts, when applicable, will apply to the Out of Pocket Maximum. **Preventive Services covered at 100%. ~If available through and authorized by medical group. ^^Additional co-pays and/or coinsurance may apply depending upon rendered services. The information presented in this chart is a summary only. For a complete understanding of benefits refer to Evidence of Coverage (EOC). Rates are subjected to specific guidelines and terms

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MEDICAL PLAN HIGHLIGHTS

CharterLIFE Believe Build Benefit

Anthem PPO MEDICAL PLANS

PPO (Preferred Provider Organization)

This is a type of plan in which insurance carriers' contract with physicians, hospitals and other healthcare providers that will provide services at discounted (negotiated) rates. One of the advantages of a PPO plan is a great deal of flexibility. Members can receive medical care without a referral from their primary care physician. Members also have access to providers; who do not have a contract with the carrier (out-of-network providers), however benefits are reduced under the plan.

How Do You Find a Network Provider?

Information on how to find a provider is located on the following page

You have two PPO plan options with Anthem – High and Low.

2022 ANTHEM PPO Benefit Comparison

PPO Medical Benefits					
PPO		**Anthem High**		**Anthem Low**	
		In Network	**Out of Network**	**In Network**	**Out of Network**
Annual Deductible^	**Employee**	**$500**	**$1,000**	**$1,500**	**$4,500**
	Family	**$1,000**	**$2,000**	**$3,000**	**$9,000**
Out of Pocket Maximum*	**Employee**	**$1,500**	**$3,000**	**$3,500**	**$10,500**
	Family	**$3,000**	**$6,000**	**$7,000**	**$21,000**
Office Visit /Specialist**		$20	70%	$15	40%
Lab & X-Rays^^		90%	70%	20%	40%
Inpatient Hospital~		90%	$500 per admit + 70% after deductible	20%	$500 per admit + 40% after deductible
Outpatient (Surgery Services)"		10%	30%	80%	60%
Rehabilitative/Chiropractic		$20	30%	$15	40%
Urgent Care		$20	30%	$15	40%
Emergency Room		$150 deductible (deductible waived if admitted)		$150 deductible + 20% coinsurance (deductible waived if admitted)	
Prescription Drugs					
Tier 1- Generic		1a: $5/ 1b: $15	1a & b: 50% coinsurance up to $250	$10	50% coinsurance up to $250
Tier 2- Preferred Brand		$25	50% coinsurance up to $250	$35	50% coinsurance up to $250
Tier 3- Non-Preferred		$45	50% coinsurance up to $250	$70	50% coinsurance up to $250
Specialty Drugs*‡		30% up to $250	50% up to $250	30% up to $250	50% up to $250
Annual Rx Deductible		None		$150 per member/ $450 family	

~The maximum payment for non-emergency inpatient services received from a non-participating provider is limited to $1,000 per day. ^^Additional co-pays and/or coinsurance may apply depending upon rendered services. "The maximum payment for non-emergency outpatient services received from a non-participating provider is limited to $350 per admission. For a complete understanding of benefits refer to Evidence of Coverage (EOC). Rates are subjected to specific guidelines and terms.

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MEDICAL PLAN HIGHLIGHTS / HOW TO FIND A PROVIDER

CharterLIFE Believe Build Benefit

Anthem PPO MEDICAL PLANS

PPO (Preferred Provider Organization)

This is a type of plan in which insurance carriers' contract with physicians, hospitals and other healthcare providers that will provide services at discounted (negotiated) rates. One of the advantages of a PPO plan is a great deal of flexibility. Members can receive medical care without a referral from their primary care physician. Members also have access to providers; who do not have a contract with the carrier (out-of-network providers), however benefits are reduced under the plan.

Anthem EPO MEDICAL PLANS

EPO (Exclusive Provider Options) – MUST USE IN-NETWORK PROVIDERS

You have one EPO plan option with Anthem – EPO Low. Please note that you must use IN-NETWORK providers, found in the Blue Cross PPO (Prudent Buyer) Network. Although this plan provides more choice and flexibility, there are NO OUT-OF-NETWORK benefits. See below for how to locate an IN-NETWORK provider.

Finding a PPO & EPO In-Network Provider

When you make an appointment with a doctor, please ask two questions:

1) ***"Are you contracted with Anthem Blue Cross?" Do not ask "Do you take PPO?"*** *because most providers take PPO insurance even if they are not contracted.*

2) ***"Can you please confirm that the attending physician accepts my health plan?" Do not assume that all providers in a medical group accept your plan, as this may be optional.***

How Do You Find a Network Provider?

There are several ways:

- ☎ Contact BRMS at 866-755-6651
- Go to www.anthem.com/ca/find-care/ and click "Guests"
  - Select - Medical Plan or Network
  - Select - California
  - Select - Medical (Employer-Sponsored)
  - Blue Cross PPO (Prudent Buyer) – Large Group

If you need assistance verifying coverage eligibility, copays, etc., or if you have any questions and prefer to speak with a live person who can immediately assist you, please call our member services hotline at 866-755-6651, Monday through Friday, from 8:00 a.m. to 6:00 p.m.

DENTAL PLAN HIGHLIGHTS

CharterLIFE Believe Build Benefit

Delta Dental DENTAL PLANS

How Do You Find a Network Provider?

☎Contact Delta Dental at 800-422-4234 (HMO)
Go to www.deltadentalins.com

You have two plan options with Delta Dental – Delta PPO 1000 & DeltaCare DHMO

2022 DELTA Dental Benefit Comparison

DENTAL BENEFIT COMPARISON					
Tier		**Dental PPO 1000**		**DeltaCare DHMO**	
		In Network	Out of Network	**In Network**	Out of Network
Annual Maximum Benefit		**$1,000**		**Unlimited**	
Annual Deductible	**Individual**	**$50**		**No Deductible**	
	Family Limit	$150 per family		**No Deductible**	
Deductible Waived		**Preventive**		**No Deductible**	
Preventive Care		**100%**	100%	**Network Only - You pay a co-pay for each covered procedure. Please refer to your Plan Details for additional information.**	
Basic Care		**80%**	60%		
Major Care		**50%**	40%		
Orthodontia		**50%**	50%		

The information presented in this chart is a summary only. For a complete understanding of benefits refer to Evidence of Coverage (EOC).

*Rates are for those members who also participate in CharterLIFE Medical Plans.

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VISION PLAN HIGHLIGHTS

CharterLIFE
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VSP VISION PLAN

How do you find a network provider?

There are several ways:

☎Contact VSP at 800-877-7195.
Go to www.vsp.com.

Vision Plan	In-Network	Out-of-Network
Frequency of Service (Exam/Lenses/Frames)	12 Months / 12 Months / 12 Months	
Copay	$10 for Exam, $25 for Materials	
Exam	Covered in Full	Reimburse up to $50
Lenses		
Single Vision	Covered in Full	Reimburse up to $50
Bifocal	Covered in Full	Reimburse up to $75
Trifocal	Covered in Full	Reimburse up to $100
Frames	$200 Allowance, then 20% off remaining balance	Reimburse up to $70
Contacts	Up to $60 copay with $150 Allowance	Reimburse up to $105

The above information is for explanation purpose only.
Please refer to Evidence of Coverage for complete details of plan benefits, limitations and exclusions.

HOW TO FILE CLAIMS

If you use the network, you do not need to submit a claim form. The provider will file it and receive payment directly from the carriers. The provider will bill you if there is any balance.

You may be asked to pay upfront and submit a claim to get reimbursed if you use an **out of network provider**. Claim forms can be downloaded and printed out from the VSP website at www.vsp.com, login to your My Benefits account or call customer service at 1.866.755.6651. You must fill out the form and send it to the carrier with a copy of the itemized receipt.

Reminder, you can now utilize your VSP benefits at your local Costco!

LIFE/AD&D PLAN HIGHLIGHTS

CharterLIFE Believe Build Benefit

Unum Basic Life/AD&D

Excel Academy Charter School offers Life and Accidental Death & Dismemberment benefits to give your family financial peace of mind if anything should happen to you.

PLEASE UPDATE BENEFICIARY INFORMATION IF NEEDED, SO THAT THE LIFE BENEFIT WILL BE PAID TO YOUR DESIGNATED BENEFICIARY. Please contact your HR representative, CharterLIFE member services at CharterLIFE@brmsonline.com or call 1.866.755.6651 to request an update/change your beneficiary. You may also go online at www.MyHealthBenefits.com.

Basic Life	$50,000
Accidental Death & Dismemberment	$50,000
Age Reduction	Reduced to 65% at age 70, to 50% at age 75.

The above information is for explanation purpose only.
Please refer to Evidence of Coverage for complete details of plan benefits, limitations and exclusions.

FSA BENEFITS

CharterLIFE™ Believe Build Benefit

Decrease Your Taxes while Increasing Healthcare Benefits

When you participate in a Flexible Spending Account (FSA), you save money both in taxes and health care costs that are not covered under your medical plan. Plus, FSAs also enable you to use tax-free dollars for dependent care too! How? Through the IRS Section 125 tax code, employers can allow employees to allocate pre-tax earnings to specific saving accounts that reduces FICA tax.

Thanks to your employer, you now have the opportunity to enroll in a FSA account!

The chart below illustrates a simple **example** of how an FSA can save you money per $2,000 worth of income:

Without an FSA Account		With an FSA Account	
$2,000	Gross Monthly Income	$2,000	Gross Monthly Income
-500	Taxes*	-200	FSA Deposit
= 1,500	Take Home Pay	= 1,800	Adjusted Gross Income
-200	Out of Pocket Medical	-450	Taxes*
$1,300	***Monthly Income***	***$1,350***	***Monthly Income***

$50 in Taxes SAVED per $2,000 of income!

**Assumes 25% in Taxes for example*

As you can see, FSAs could save you hundreds, even thousands of dollars a year! By paying healthcare and/or dependent care expenses not covered by insurance plans with tax-saving dollars, you can essentially reduce your out-of-pocket costs. Best of all, it does not cost anything to participate.

How It Works

During your open enrollment period, just sign on to Vbas and follow the simple walk through enrollment steps. Decide how much money to set aside from each paycheck to reach a total amount over the course of the year (For example, $50 per pay period over 24 pay periods allocates $1200 to your FSA for one year). Ask your employer what the maximum amount is.

IMPORTANT: Dollars unused are not refundable or transferable to the next calendar year as stated by Federal Law. Plus, contributions can only be increased or decreased if one of the 13 IRS qualifying events occurs. Ask your employer for more information.

Once you have an expense occur covered by FSA regulations (See back for details), reimbursement is simple. After submitting a form with proper proof of transaction, a check is cut directly to you. For Health Care FSA, if the expense exceeds the amount saved to date, that's okay. Just as long as your total yearly savings covers the expense, you can receive advanced reimbursement. For Dependent Care FSA, your expenses cannot exceed the current year-to-date amounts withheld.

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FSA BENEFITS

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Expense List of FSA's

Flexible Spending Accounts provide a cost shelter to pay for "medically necessary" and dependent needs with pre-tax dollars. The following are medical expenses. This is not an inclusive list. Ask your employer or see IRS Publication 502.

Most Common Reimbursable Expenses

- Abortion
- Acupuncture
- Alcohol Rehabilitation
- Ambulance
- Artificial Insemination
- Birth Control Pills
- Braces
- Chiropractor
- Coinsurance
- Contact Lenses & Cleaning Solutions
- Co Pays
- Crutches
- Deductibles
- Dentist
- Diathermy
- Drug Rehabilitation
- Eye Exam
- Eye Glasses
- Guide dog
- Hearing Devices & Batteries
- Hospital Services
- Insulin
- Iron Lung
- In Vitro Fertilization
- Laboratory Fees
- Lip-reading lessons
- Lodging for medical care
- Medical Information plan
- Mentally Disabled, special home
- Nursing care
- Nursing home
- Orthodontist
- Oxygen
- Physical Therapy
- Physician
- Podiatrist
- Psychologist
- Routine Physical Examination
- Surgery & Related Expenses
- Television for Deaf (closed captioning)
- Transportation (related to illness)
- Tubal Ligation
- Vasectomy
- X-rays

Health Care Reform Impacts Over The Counter Drugs (OTC)

Individuals participating in a flexible spending account (FSA), health reimbursement arrangements (HRA) or health savings account (HSA) are no longer able to use tax-advantage money for the reimbursement of over-the-counter medications that are not prescribed by a doctor. **This does not affect insulin, even if purchased without a prescription** or other health care expenses such as medical devices, eye glasses, contact lenses, co-pays and deductibles.

All over the counter medicines and or drugs purchased must be accompanied by a prescription from a physician for reimbursement.

Prescription Definition

According to the IRS, "a prescription means a written or electronic order for a medicine or drug that meets the legal requirements of a prescription in the state in which the medical expense is incurred and that is issued by an individual who is legally authorized to issue a prescription in that state."

Questions?

Please contact BRMS customer support at **1-866-755-6651**

Eligible Dependent Care Expenses

An eligible dependent is any dependent who is less than 13 years old and your dependent under federal income tax rules. An eligible dependent may also include your mentally or physically impaired spouse or a dependent who is incapable of caring for himself or herself (for example, an invalid parent). The dependent must spend at least eight hours per day in your home.

Child care services will qualify for reimbursement from the Dependent Care Reimbursement Account if they meet these requirements:

- The child must be under 13 years old and must be your dependent under federal tax rules. Note: If your child turns 13 during the plan year, you must stop your contribution at that time.
- The services may be provided inside or outside your home, but not by someone who is your minor child or dependent for income tax purposes (for example, an older child).
- If the services are provided by a day-care facility that cares for six or more children at the same time, it must be a qualified day-care center.
- The service must be incurred to enable you, or you and your spouse if you are married, to be employed.
- The amount to be reimbursed must not be greater than your spouse's income or one-half your income, whichever is lower.
- Services must be for the physical care of the child, not for education, meals, etc. Kindergarten expenses must separate out the cost of custodial care from education to reimburse.

Allowable Dependent Care expenses include payments to the following when the expenses enable you to work:

- Child care centers
- Family day care providers
- Baby-sitters
- Nursery schools
- Caregivers for a disabled dependent or spouse who live with you
- Household services, provided that a portion for these expenses are for a qualifying dependent incurred to ensure the dependent's well-being maintenance

Ineligible Dependent Care Expenses

- Dependent care expenses that are provided to one of your dependents by a family member, unless the family member is age 19 or over by the end of the year and will not be claimed as a dependent
- Expenses for food and clothing
- Education expenses from Kindergarten on
- Overnight camps
- Transportation

Ask your employer for complete details

MISCELLANEOUS BENEFITS

Travel Assistance Program

Travel assistance program provides help for members away from home (100 miles or more) to find and obtain emergency medical care in an unfamiliar place, and to return members home when stabilized.

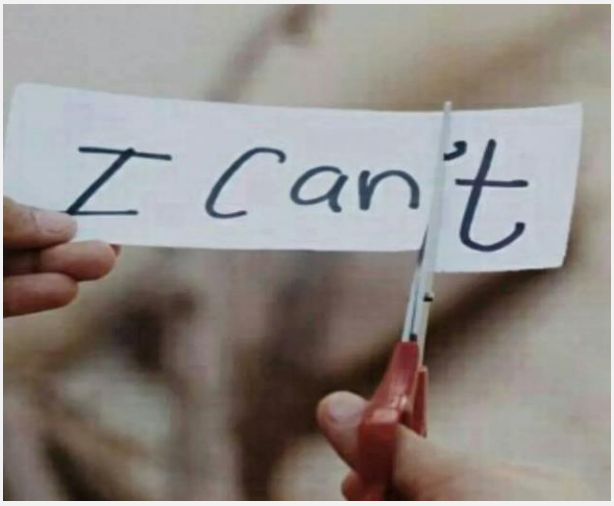
When you experience a medical emergency, you can call Assist America to receive help. Please call customer service at 800-421-0344 for additional information about this program. Medically certified personnel can connect you with pre-qualified, English-speaking and Western-trained medical providers anywhere in the world 24 hours a day, 7 days a week.

Employee Assistance Program (EAP)

Excel Academy Charter School offers you and your family members access to EAP benefits, administered by Unum. This important benefit is designed to help you and your family with issues that affect your personal and professional lives. The information you share with the EAP counselor (and any outside resource) is completely confidential. You may receive up to three face-to-face counseling sessions.*

*This benefit is available 24 hours a day, 7 days a week to discuss personal and professional concerns related to but not limited to the following issues:

- Marital or family concerns
- Interpersonal problems
- Stress and emotional distress
- Alcohol and drug abuse
- Job-related problems
- Child and elder care consultations



ADDITIONAL INFORMATION

When using your insurance plan, remember the following…

Below you will find helpful information on ways to maximize your benefits, and important things to remember when using your insurance plan benefits.

Advantage of PPO Providers

- Within the provider contract, insurance carriers set allowable charges for all procedures. PPO providers are prohibited from charging more than the allowable charge.
- On the other hand, there is no set agreement between insurance carriers and Non-PPO providers. Non-PPO providers can charge any amount. Therefore, the insurance carrier sets the maximum amount that is considered eligible for reimbursement based on geographical data. When a non-PPO provider charges more than the maximum amount, you are going to be responsible for any excess amount.

For example, under the dental plan, you had a crown. (Insurance carrier pays at 50%. Assuming you had met the $50 deductible):

Provider charge was $800, Allowable charge was $400, Maximum amount for non-PPO providers was $600

In Network		Out of Network	
Allowable charge	$400	Provider Charge	$800
Insurance Payment (50%x$400)	-$200	Insurance Payment (50%x$600)	-$300
Your Responsibility	**$200**	**Your Responsibility**	**$500**

How to Search PPO Providers

- There are a couple of ways to search providers:
  - ✓ Call the insurance company's customer service number (on your ID card)
  - ✓ Check the provider directory on the insurance carrier's website
  - ✓ Call and verify coverage with the provider (are you contracted with ABC insurance company?)
- The easiest way would be checking the carrier website; however, the information may not be up-to-date depending on how frequently the carrier updates their system. In case you are planning to have an expensive procedure (surgery, etc.), we recommend you call the provider directly.

Explanation of Benefits (EOB)

- The EOB is a statement that shows how much should be paid, and by what party.
- If your out-of-pocket payment amount on an EOB is different from the amount charged by the provider, there may be an error. We recommend you **contact Merica Mojica at Dickerson Insurance Services at (323) 662-7810**, so that we can investigate the details on your behalf.

ADDITIONAL INFORMATION

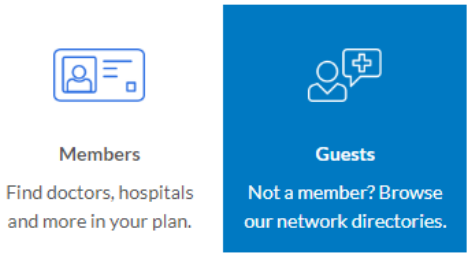
Anthem Blue Cross

Find a Provider Tool

VISIT - www.anthem.com/ca/find-care/

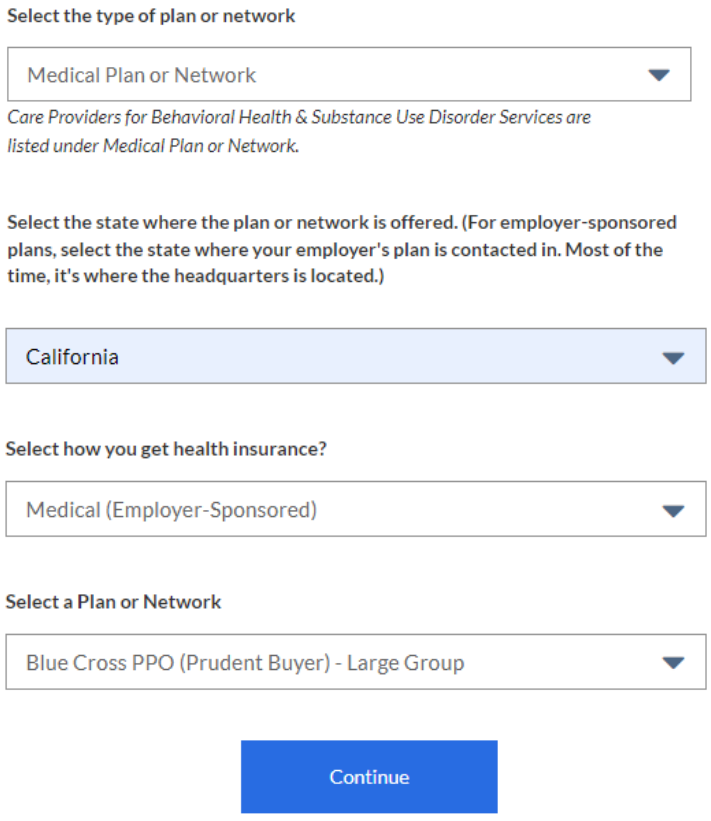
If you're a member, log in to Find Care and view personalized search results based on your plans and benefits. If you don't have an account, register now.

Step 1



Answer a few questions and then select a plan or network.

Step 2



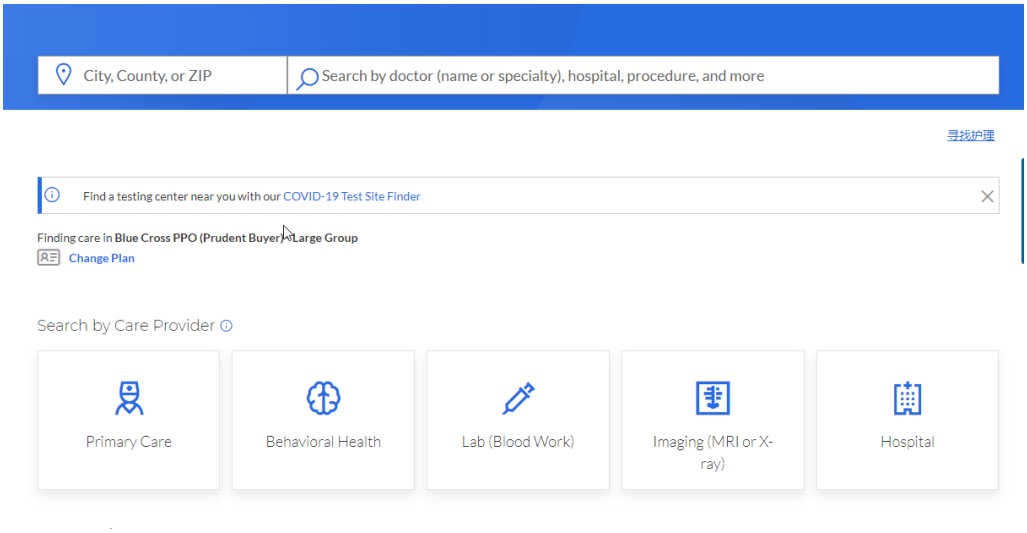
ADDITIONAL INFORMATION

Anthem Blue Cross

Find a Provider Tool

VISIT - www.anthem.com/ca/find-care/

Step 3



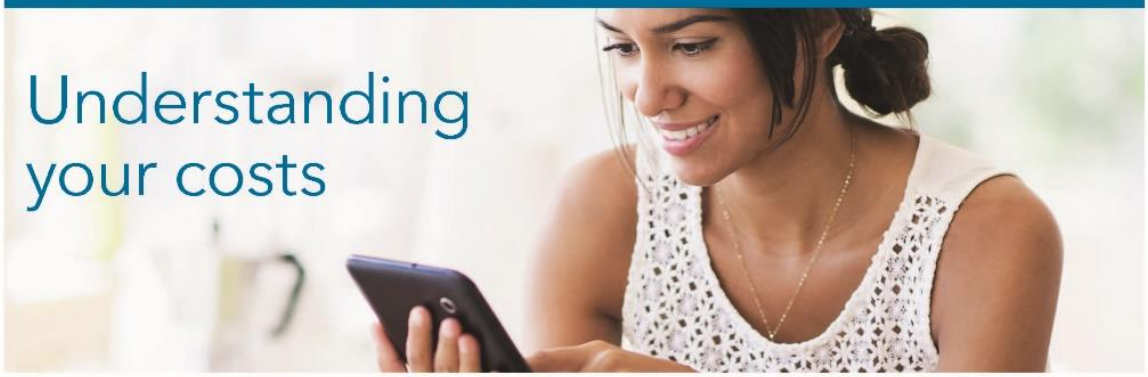
If you need assistance finding providers, verifying coverage eligibility, copays, etc., or if you have any questions and prefer to speak with a live person who can immediately assist you, please call our member services hotline at 866-755-6651, Monday through Friday, from 8:00 a.m. to 6:00 p.m.

ADDITIONAL INFORMATION

CharterLIFE
Believe Build Benefit

For Kaiser Permanente Deductible Plan Members

Understanding your costs



With your deductible plan, you'll pay the full charges for covered services until you reach your deductible. Then you'll start paying less – a copay or a coinsurance.* These steps show what to expect before, during, and after your visit – so you can avoid surprises and better understand and manage your health care costs.

1 Before your visit

Get an estimate

Visit **kp.org/costestimates** for an estimate of what you'll pay for common services. Estimates are based on your plan benefits and whether you've reached your deductible – so you get personalized information every time.

You can also call **1-800-390-3507,** weekdays from 7 a.m. to 5 p.m.

Visit kp.org/deductibleplans

You'll find a wide range of information and resources to help you understand your plan and manage your costs.

2 During your visit

Pay when you check in

When you come in for care, you'll be asked to make a payment for your scheduled services.[1]

Your payment may only cover part of what you owe for your visit, especially if you get any additional services. In that case, you'll get a bill for the difference later.

Expect a bill for additional services

During your visit, your doctor may decide you also need services that weren't scheduled – like a blood test or an X-ray. If what you pay for these services doesn't cover everything you owe, you'll get a bill later.

3 After your visit

Understand your bills

You'll get a bill after most visits. It will show the charges for the services you got, what you paid, what your health plan paid, and the amount you owe.

You can pay your bill:

- Online anytime at **kp.org/paymedicalbills**
- By mail
- By phone at **1-800-390-3507,** weekdays from 7 a.m. to 5 p.m.

Track your expenses

You'll also get an Explanation of Benefits (EOB). It isn't a bill. It's a summary of your services and charges, and shows how close you are to reaching your deductible and out-of-pocket maximum. Visit **kp.org/mydocuments** anytime to see your EOBs online.

See the next page for important terms and more information about services that can result in a bill.

*Depending on your plan, you may pay copays or coinsurance for some services without having to reach your deductible.

[1]If your plan comes with a flexible spending account (FSA), health reimbursement arrangement (HRA), or health savings account (HSA), you can pay using the debit card for your account, if you have one. Use it when you check in for your visit or when paying your bill later.

kp.org/deductibleplans

KAISER PERMANENTE®

ADDITIONAL INFORMATION

CharterLIFE™ Believe Build Benefit

When a preventive visit includes non-preventive care

Preventive care services are an important part of catching health problems early – that's why they're covered at no cost or at a copay.* But sometimes when you come in for preventive care, you'll get non-preventive services too, which you'll need to pay for.

For example, during a routine physical exam, your doctor might find a mole and remove it for testing. Because the mole removal and testing are non-preventive services, you'll get a bill for them later.

Have questions or need help paying for care?

Call 1-800-390-3507, weekdays from 7 a.m. to 5 p.m., if you have questions about your costs or bills. You can also get information about financial assistance and payment options available for members who need help paying for care.

Important terms

Deductible
The amount you pay for covered services each year before your health plan starts paying. Depending on your plan, you may pay copays or coinsurance for some services without having to reach your deductible.

Copay
The set amount you pay for covered services. For example, a $10 copay for an office visit.

Coinsurance
A percentage of the charges that you pay for covered services. For example, a 20% coinsurance for a $200 procedure means you pay $40.

Out-of-pocket maximum
The most you'll pay for covered services each year. For a small number of services, you may need to keep paying copays or coinsurance after reaching your out-of-pocket maximum.†

*Depending on your plan, preventive care services are covered at no cost or at a copay. For more information, see your *Evidence of Coverage* or *Summary Plan Description*.

†If you have an HSA-qualified deductible plan, once you reach your out-of-pocket maximum, you won't have to pay anything for covered services for the rest of the year. If you are enrolled through a group's self-funded EPO plan, your health benefits are self-insured by your employer, union, or Plan sponsor. Kaiser Permanente Insurance Company provides certain administrative services for the Plan and is not an insurer of the Plan or financially liable for health care benefits under the Plan.

Kaiser Permanente does not discriminate on the basis of age, race, ethnicity, color, national origin, cultural background, ancestry, religion, sex, gender identity, gender expression, sexual orientation, marital status, physical or mental disability, source of payment, genetic information, citizenship, primary language, or immigration status.

Language Assistance Services

English: We provide interpreter services at no cost to you, 24 hours a day, 7 days a week, during all hours of operation. You can have an interpreter help answer your questions about our health care coverage. You can also request materials translated in your language at no cost to you. Just call us at **1-800-464-4000,** 24 hours a day, 7 days a week (closed holidays). TTY users call **711.**

Spanish: Ofrecemos servicios de traducción al español sin costo alguno para usted durante todo el horario de atención, 24 horas al día, siete días a la semana. Puede contar con la ayuda de un intérprete para responder las preguntas que tenga sobre nuestra cobertura de atención médica. Además, puede solicitar que los materiales se traduzcan a su idioma sin costo alguno. Solo llame al **1-800-788-0616,** 24 horas al día, siete días a la semana (cerrado los días festivos). Los usuarios de TTY, deben llamar al **711.**

Chinese: 我們每週 7 天， 每天24小時在所有營業時間內免費爲您提供口譯服務。 您可以請口譯員協助回答有關我們健康保險的問題。 您也可以免費索取翻譯成您所用語言的資料。 我們每週7天， 每天24小時均歡迎您打電話 **1-800-757-7585** 前來聯絡（節假日 休息）。 聽障及語障專線 (TTY) 使用者請撥 **711**。

KAISER PERMANENTE®

Please recycle. 60538830 December 2016

Before the Appointment...

- For some procedures (hospitalization, outpatient surgery, etc.), insurance carriers require pre-authorization. When you go to non-PPO providers, you are the one responsible for filing the pre-authorization. PPO providers do file pre-authorizations on behalf of patients; however, you may want to confirm with your provider that it was filed.
- For dental treatment, **it is recommended** that you have your dentist submit a request for a **pre-treatment estimate** for services in excess of $300 to Delta Dental by submitting a claim form along with the proposed treatment plan. A pre-treatment estimate will be sent to you and the dentist detailing an estimate of what services your plan will cover and at what payment level.

Types of Prescription Drugs

- Generally, prescription drugs can be separated into two categories (Generic and Brand). Brand name drugs are patent protected (manufactured and sold by only one pharmaceutical company) and tend to be very expensive. On the other hand, Generic drugs are no longer patent protected, and multiple pharmaceutical companies are able to produce these drugs with same or similar effects as Brand name drugs. Generic drugs are less expensive. Therefore, in the event that a doctor prescribes a Brand name drug, it is highly recommended that the patient (employee or dependent) ask the doctor for a Generic alternative.
- In the event that multiple Brand name drugs can be used for the same medical condition, the insurance carrier specifies which Brand name drug is preferred. The insurance carrier's drug list for these types of drugs is called the Formulary Drug List. Purchasing Non-Preferred Brand drugs will be more costly.
- The Formulary Drug List can be found on the insurance carrier's website. It is important to note that some carriers may change their Formulary Drug List every ninety days.

Mail Order Prescription Service

- For prescription drugs taken on a regular basis, you can take advantage of the insurance carrier's mail order service.
- Out-of-pocket costs may be cheaper when using this service.

Emergency Services

- Unless you have a "life threatening" condition, you should go to an Urgent Care Center instead of the Emergency Room. Compared to hospital emergency rooms, you are usually able to see a doctor quicker. Your payment may also be less. It is important to know the location of your local Urgent Care centers nearby in advance.

HEALTH INSURANCE TERMS

Helpful Health Insurance Terms

The health care system in the United States can be confusing. In order to get the most out of your health care benefits, you need to understand the terms used by insurance companies, health plans and health care providers. This way, you can make better decisions and ultimately receive better care.

- **Ambulatory Care** – Health care services that do not require a hospital stay, such as those delivered in a doctor's office, clinic or day surgery center.
- **Assignment of Benefits** – This means signing a document that allows your hospital or doctor to collect your health insurance benefits directly from your health carrier. Otherwise, you pay for treatment and the insurance company reimburses you.
- **Benefits** – The amount of money payable by an insurance company to a claimant under the insurance policy.
- **Capitation** – Represents a set dollar limit that a health maintenance organization (HMO) pays to your primary care physician for providing medical treatment to you and your dependents. The fee is usually paid to the physician on a monthly basis. The physician gets no more or less than this set fee, no matter how much or how little you use his or her services.
- **Case Management** – A technique that insurance companies and HMOs use to ensure that individuals receive appropriate, timely and reasonable health care services.
- **Claim** – A request by an individual (or his or her provider) for the insurance company to pay for services obtained.
- **Coinsurance** – The money that an individual is required to pay for services, after a deductible has been paid. It is often a specified percentage of the charges. For example, the employee pays 20 percent of the charges while the health plan pays 80 percent.
- **Copayment** – An arrangement where an individual pays a specified amount for various health care services and the health plan or insurance company pays the remainder. The individual must usually pay his or her share when services are rendered. The concept is similar to coinsurance, except that copayments are usually a set dollar amount (such as $20 per office visit), rather than a percentage of the charges.
- **Deductible** – A set dollar amount that a person must pay before insurance coverage for medical expenses can begin. They are usually charged on an annual basis.
- **Denial of claim** – Refusal by an insurance company to pay a submitted request for health care services obtained.
- **Exclusions and Limitations** – Specific conditions or circumstances for which an insurance policy or plan will not provide coverage (exclusions), or for which coverage is specifically limited (limitations).
- **Health Maintenance Organization (HMO)** – Prepaid, or capitated, health care plans in which individuals pay a small monthly fee to be a member of the HMO, as well as small fees or copayments for specified health care services. Services are provided by physicians and allied health care personnel who are employed by or under contract with the HMO. HMOs are available to both individuals and employer groups.

- **In-Network** –Typically refers to physicians, hospitals or other health care providers who contract with the insurance plan (usually an HMO or PPO) to provide services to its members. Coverage for services received from in-network providers will typically be greater than for services received from out-of-network providers, depending on the plan.
- **Long-Term Care Insurance** – Insurance policies that cover the costs of providing nursing care, home health care services, and custodial care for the aged and infirm.
- **Managed Care** – A system of health care delivery that is characterized by arrangements with selected providers, ongoing quality control and utilization review programs, and financial incentives for members to use providers and procedures covered by the plan.
- **Maximum Benefit** – The maximum dollar amount that an insurance company will pay for claims, either for a specific service or procedure, or during a specified period of time.
- **Medically Necessary** – A term used to describe the supplies and services needed to diagnose and treat a medical condition in accordance with the standards of good medical practice. Many health plans will only pay for treatment deemed medically necessary. For example, most plans will not cover elective cosmetic surgery.
- **Out-of-Network** – Typically refers to physicians, hospitals or other health care providers who do not contract with the insurance plan (usually an HMO or PPO) to provide services to its members. Depending upon the insurance plan, expenses incurred for services provided by out-of-network providers might not be covered, or coverage may be less than for in-network providers.
- **Out-of-Pocket Maximum** – The total amount paid each year by the member for the deductible and coinsurance. After reaching the out-of-pocket maximum, the plan pays 100 percent of the allowable charges for covered services the rest of that calendar year.
- **Pre-Admission Certification** – Also called "precertification" or "pre-admission review." Approval granted by a case manager or insurance company representative (usually a nurse) for a person to be admitted to a hospital or inpatient facility before admittance. The goal is to ensure that individuals are not exposed to inappropriate health care services, or services that are not medically necessary.
- **Pre-Existing Condition** –Any medical condition that was diagnosed or treated within a specified period immediately before a health insurance policy became effective. These conditions may not be covered for a specified period of time under the new policy.
- **Preferred Provider Organization (PPO)** – A type of managed care plan in which doctors and hospitals agree to provide discounted rates to plan members. Patients are typically reimbursed 80 to 100 percent for treatment received within the network, versus 50 to 70 percent outside the network.
- **Primary Care Physician (PCP)** – A health care professional who is responsible for monitoring an individual's overall health care needs. Typically, a PCP serves as a gatekeeper for an individual's medical care, referring him or her to specialists and admitting him or her to hospitals when needed.
- **Reasonable and Customary Charges** – The commonly charged or prevailing fees for health services within a geographic area. If charges are higher than what an insurance carrier considers reasonable and customary, the carrier will not pay the full amount and instead will pay what is deemed appropriate for the particular service. The remaining charges then are the responsibility of the patient.
- **Waiting Period** – A period of time in which your health plan does not provide coverage for a particular pre-existing condition.

EXCEL ACADEMY
A TK-12 Public Charter School

EACS GROUP BENEFITS

Medical, Dental, and Vision
2023-2024

MEDICAL

Extending renewal of all current plans

KAISER

HMO (Low and High)

ANTHEM BLUE CROSS

EPO (low and high)
PPO (low and high)

KAISER

8.7% Premium Increase

**** Due to increase in post pandemic claim submission*

HOW WE CAN HELP

Excel Academy Charter School will offer HMO HDP to offset premium increase for applicable users.

ANTHEM BLUE CROSS

3-8% Increase

****Standard market - post pandemic claim submission on the EPO plans*

HOW WE CAN HELP

Excel Academy Charter School will offer TWO new ABC plans to offset premium increase for applicable users.

PPO - Base

EPO - Base

DENTAL & VISION

DELTA DENTAL

- Extending renewal on current plan & adding a NEW PPO 2000 plan
- 1.7% increase

VSP VISION

- Extending renewal on current plan
- 0.9% increase

Other ancillary offerings include:

SUPPLEMENTAL

- Accident
- Cancer

FLEXIBLE SPENDING ACCOUNTS

- Dependent Care
- Healthcare

LIFE INSURANCE

- FREE Employer sponsored $50k
- NEW Buy up to 2x annual compensation (Employee sponsored)

BENEFITS – RETIREMENT

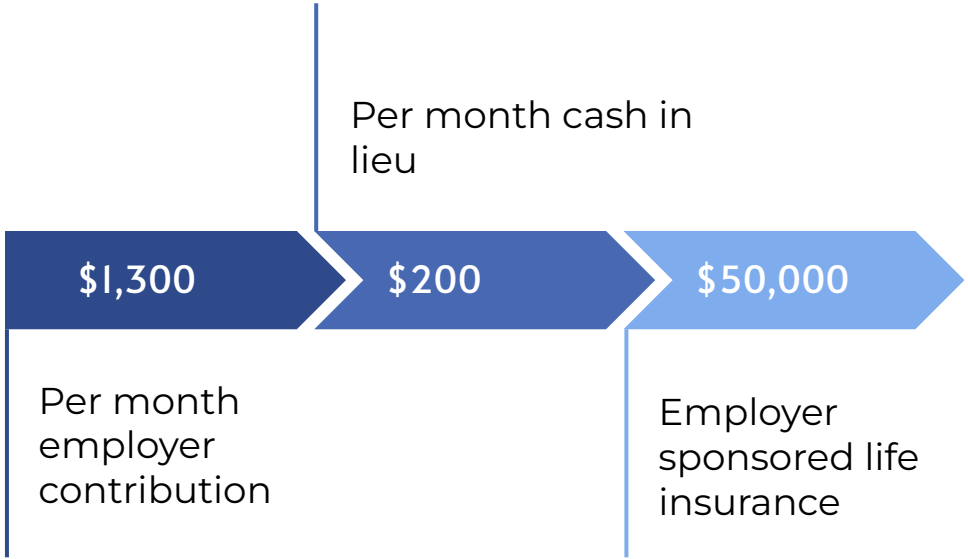
CERTIFICATED

CALSTRS standard employer contribution

CLASSIFIED

Increased employer match from 5% to 7%

WE AIM TO SUPPORT!



NEW Option to buy up

Increased 403(b)/ 457 match from 5% to 7% for classified staff

3 NEW Low cost medical plans

1 NEW Richer dental plan

THANK YOU!

Coversheet

Local Indicators and Local Control & Accountability Plan (LCAP) 2023-24

Section: XIV. Public Hearing
Item: A. Local Indicators and Local Control & Accountability Plan (LCAP) 2023-24
Purpose: Discuss
Submitted by:
Related Material:
Local Indicators and the Local Control and Accountability Plan 2023-2024.pdf
2023_Local_Control_and_Accountability_Plan_Excel_Academy_Charter_School_-_Warner_20230609 FINAL.pdf
2023_Local_Control_and_Accountability_Plan_Excel_Academy_Charter_School_-_Helendale_20230608 FINAL.pdf

EXCEL ACADEMY CHARTER SCHOOL

Local Indicators and the 2023-24 Local Control and Accountability Plan (LCAP)

About the Local Indicators

Excel Academy will provide a flexible, personalized learning experience where teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student.

- LEAs are required to annually complete the California Dashboard self-reflection report.
- The State Board of Education adopted performance standards that require LEAs to annually measure its progress.
- The CA Dashboard Local Indicator Report was completed for submission September 30, 2022 and reviewed by the Executive Director. The information was also shared with the Board of Directors.

Teacher Assignment

- There are no mis-assignments of teachers of English Learners, and there are no vacant teacher positions.
- All students have access to standards-aligned instructional curriculum and materials.

Academic Standards and Curriculum

- EACS reports *Full Implementation* in Next Generation Science Standards (NGSS) and *Full Implementation and Sustainability* in math, English Language Arts (ELA), English Language Development (ELD), and Social Science.

Support for Teachers and Administrators

- EACS reports *Full Implementation and Sustainability* in professional development, making instructional materials aligned to standards for all students, supporting staff and areas for improvement, and academic standards adopted by the State Board of Education for all students.

Educational Partner Engagement

Excel Academy has fostered a collaborative relationship with our educational partners to ensure that best practices are in place to serve all students across all subgroups.

- Staff meetings - review of schoolwide goals
- Surveys to stakeholders - results analyzed and shared
- ELAC: 9/7/2022, 11/2/2022, 2/1/2023, 5/3/2023
- SSC: 9/13/2022, 11/3/2022, 2/2/2023, 5/4/2023
- PAC: 11/1/2022, 5/1/2023
- SELPA Approval - June 2023 submitted
- School Board LCAP Draft Public Hearing: 6/15/2023
- School Board LCAP Adoption Public Meeting: 6/22/2023

Educational Partner Feedback

"I believe we have everything possible with Excel to achieve my children's success in learning and can't think of anything else we may need in order to reach our goals."

"Excel Academy staff is excellent!"

"Our ToR has been so instrumental in my daughters successes. I couldn't be more grateful for her!"

"I am so pleased and impressed with Excel. I appreciate the team of teachers and professionals that have made our transition from a brick and mortar school to a virtual school so seamless. Our Teacher of Record is extremely responsive and creative in her supports to our family. Thank you!"

"Please continue with this outstanding approach to education, it is greatly appreciated!"

"I really appreciate your Vision and Mission statements. They are in alignment with what our family believes what educational institutions should be aiming."

LCAP Survey Results

LCAP GOALS

The LCAP is a tool for setting goals and planning actions
to meet those goals to improve student performance.

EACS has established:

- Four goals
- Actions aligned to each goal
- Measuring and reporting metrics
- Analysis of the effectiveness of each action

Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.

Goal 1 - Focus on Student Achievement

Aligned with State Priorities:

- State Standards and access to curriculum aligned instructional materials
- Qualified and Effective Teachers, Teacher Credentialing
- Course Access - Availability of textbooks and other instructional materials
- Student Achievement

Measuring and Reporting Results:

- CAASPP, i-Ready, and ELPAC Data

Goal 1 - Effectiveness

- **All eight actions were determined effective.**
    - Students have benefited academically from the increase of support provided by EACS teachers and intervention teams.
    - Increase in student performance on the i-Ready local assessment, strong CAASPP baseline results, and graduation rates.
    - Increase in student participation in interventions and services to support academic achievement.

We will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.

Goal 2 - Maintenance Goal that includes actions that are ongoing and focused on regular attendance and student achievement.

Aligned with State Priorities:

- State Standards and access to curriculum aligned instructional materials
- Qualified and Effective Teachers
- Pupil Achievement: equity in education, assessment, curriculum and instruction
- Pupil Engagement: attendance

Measuring and Reporting Results:

- Maintain or decrease Chronic Absenteeism
- Strive for 0% Expulsion and Suspension Rates
- 100% Qualified and Effective Teachers

Goal 2 - Effectiveness

- **All five actions were determined effective.**
    - Increase in student attendance
    - Increase of student participation in SEL lessons, ELD Live, and WIN intervention classes.

Attendance and the interventions in place supported progress in both ELA and mathematics as indicated by internal data results.

We will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all Educational Partners opportunities for input in decision making for policy and program improvement.

Goal 3 - Maintenance goal that focuses on the correlation between establishing connections and partnerships in education with school attendance and student success.

Aligned with State Priorities:

- Educational Partner Involvement: Effort to seek input and participation
- Pupil Engagement: School attendance rates
- School Climate: Sense of safety and connectedness

Measuring and Reporting Results:

- Participation/Input Survey Results
- Maintain or increase survey outcomes by 2% each year
- Annual safety review/updates and training

Goal 3 - Effectiveness

- **All seven actions were determined effective.**
    - Increase in participation on the LCAP/WASC feedback survey for all stakeholders
    - Increased the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

    EACS recognizes a continued need to increase parent participation in SSC, ELAC and the PAC meetings.

We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all educational partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.

Goal 4 - Broad goal that includes actions that support our students to achieve their goal of high school graduation and college and career preparedness through continual monitoring of graduation rate, CTE participation, student data, and interventions.

Aligned with State Priorities:

- Basics: Qualified/Effective Teachers
- State Standards: State adopted academic content
- Pupil Engagement: School attendance and chronic absenteeism
- Course Access
- Pupil Outcomes

Measuring and Reporting Results:

- Graduation and Dropout Rate
- Access to Broad Curriculum: Career Technical Education (CTE) Participation and College/Career Preparedness
- Students enrolled in and completion of A-G courses required for UC/CSU Admission

Goal 4 - Effectiveness

- **All seven actions were determined effective.**
  - 118 students in total enrolled in UC/CSU required courses for admission.
  - Excel Academy removed barriers such as Advanced Placement exam costs for low income and foster-youth students experiencing financial hardship, and observed greater student interest in Advanced Placement (AP), CTE, and A-G courses.

    The continued goal is to increase enrollment in these courses.

Reflections and Successes

- California Distinguished School
- Consistent Communi-cation
- Systems of Support
- Opportunities for Students
- Increased proficiency in math and ELA
- Closing the learning gap
- High Graduation Rate
- 0% Suspensions or Expulsions
- Increased A-G courses

EXCEL ACADEMY

What we are all about: Our Vision

C Compassion, Creativity , Collaboration, Challenge, & Confidence.

H Helpful, Hands-On , Humility, & Happiness.

O Optimism, Options, Opportunities, Ownership, & Others

I Independence, Individualization, Inspiration, & Investigation

C Child-focused , Curiosity, Critical Thinking, Consideration, & Community

E Education, Equity, Enjoyment. Exploration & Empowerment

Powered by BoardOnTrack

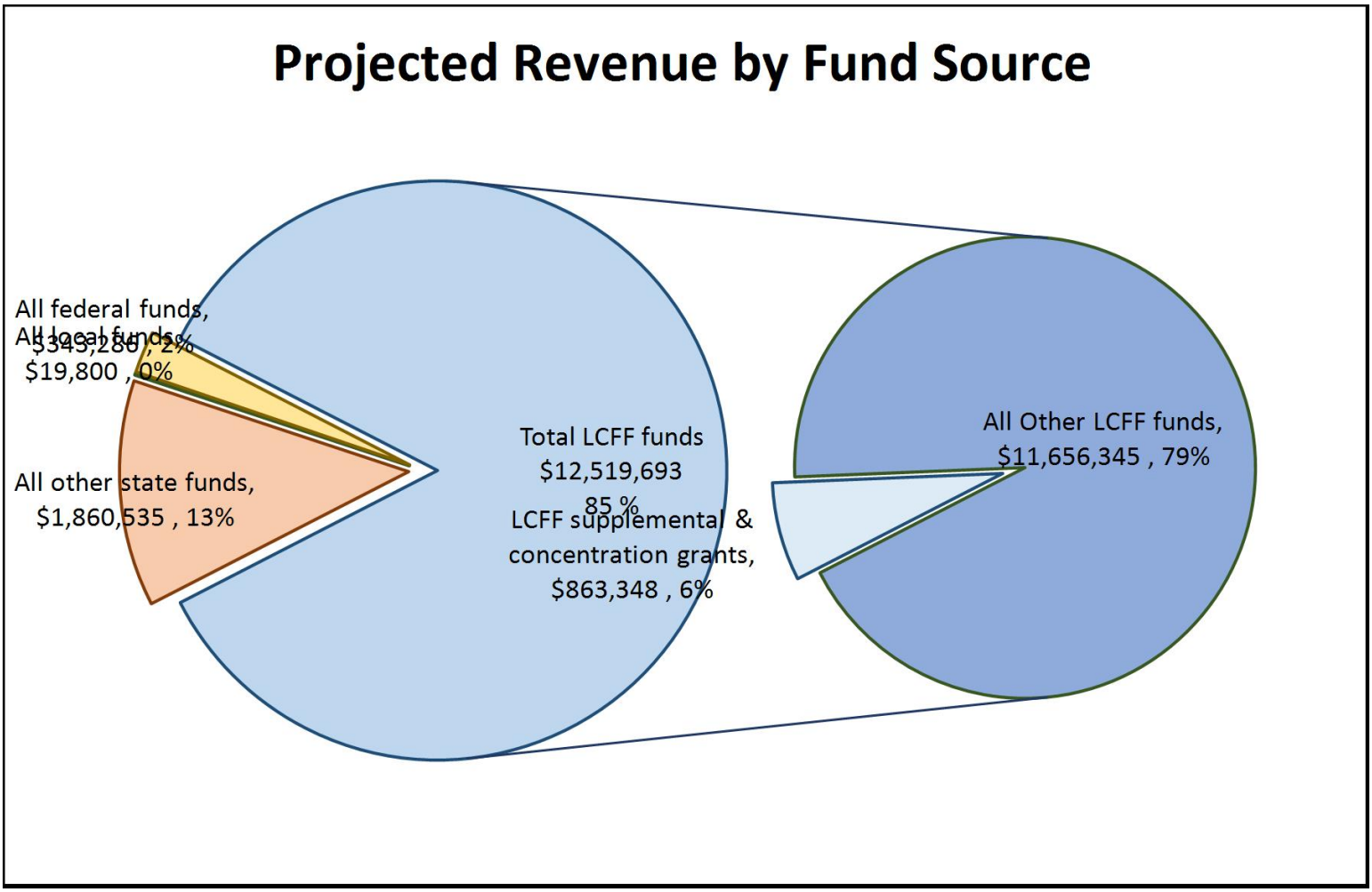
LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Excel Academy Charter School - Warner
CDS Code: California
School Year: 2023-24
LEA contact information:
Heidi Gasca
Executive Director

(949) 412-3122

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

Budget Overview for the 2023-24 School Year

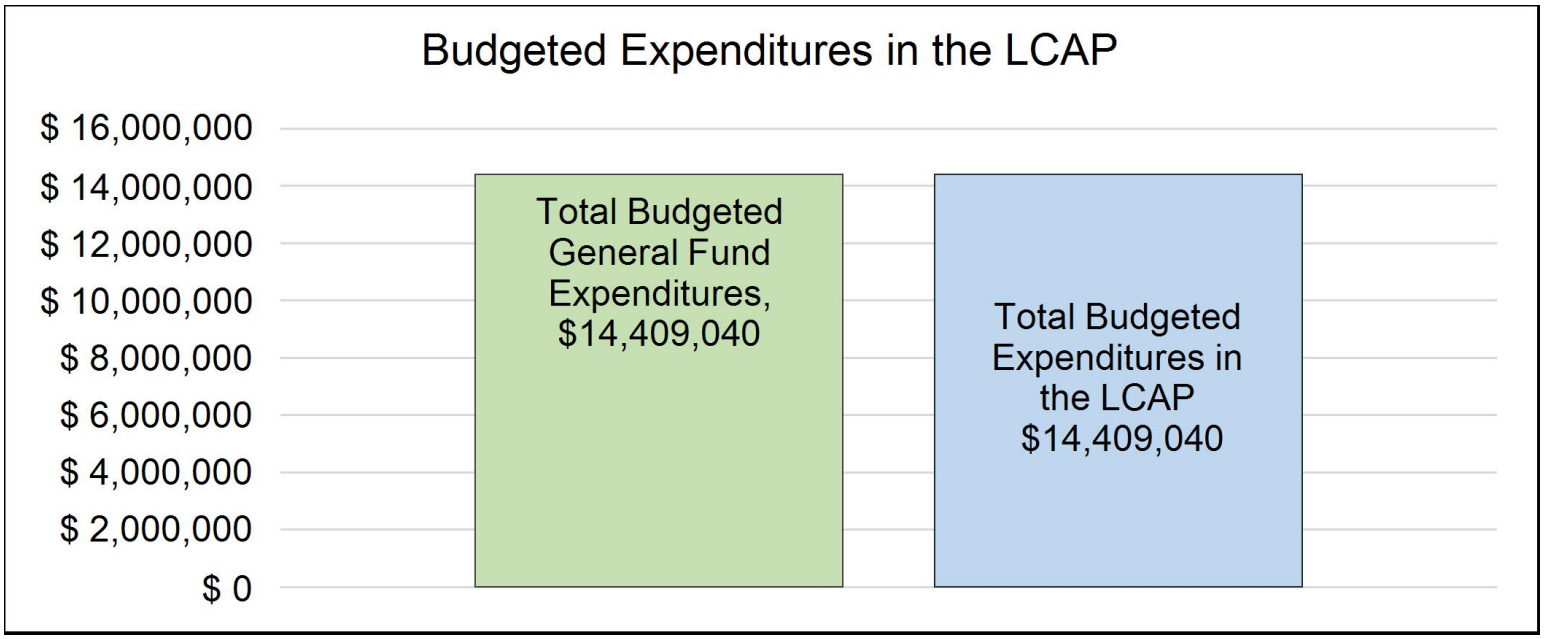


This chart shows the total general purpose revenue Excel Academy Charter School - Warner expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Excel Academy Charter School - Warner is $14,743,314, of which $12,519,693 is Local Control Funding Formula (LCFF), $1,860,535 is other state funds, $19,800 is local funds, and $343,286 is federal funds. Of the $12,519,693 in LCFF Funds, $863,348 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Excel Academy Charter School - Warner plans to spend for 2023-24. It shows how much of the total is tied to planned actions and services in the LCAP.

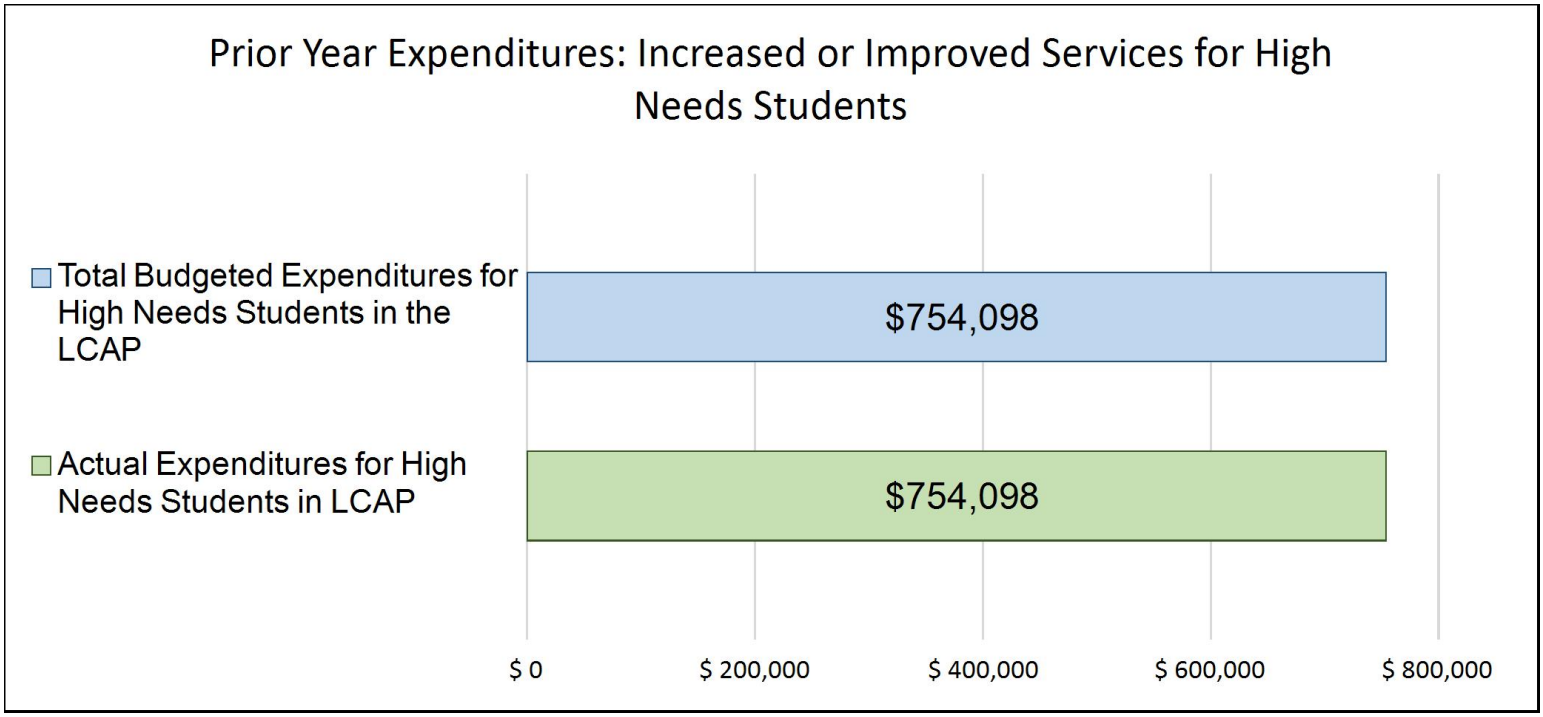
The text description of the above chart is as follows: Excel Academy Charter School - Warner plans to spend $14,409,040 for the 2023-24 school year. Of that amount, $14,409,040 is tied to actions/services in the LCAP and $0 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Excel Academy Charter School - Warner is projecting it will receive $863,348 based on the enrollment of foster youth, English learner, and low-income students. Excel Academy Charter School - Warner must describe how it intends to increase or improve services for high needs students in the LCAP. Excel Academy Charter School - Warner plans to spend $863,348 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2022-23



This chart compares what Excel Academy Charter School - Warner budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Excel Academy Charter School - Warner estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2022-23, Excel Academy Charter School - Warner's LCAP budgeted $754,098 for planned actions to increase or improve services for high needs students. Excel Academy Charter School - Warner actually spent $754,098 for actions to increase or improve services for high needs students in 2022-23.

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Warner	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

Plan Summary [2023-24]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Excel Academy Charter School is an non-classroom based California charter school offering a tuition-free personalized learning independent study model for students in grades TK-12 . Our high-quality, educational program is rooted in flexible learning, personalized schedules, and proven systems of support where credentialed teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student. Excel Academy is accredited by the Western Association of Schools and Colleges (WASC) which is a statement to the community and educational partners that the institution is reputable, student oriented, focused on quality education and student performance, and is committed to ongoing improvement. Excel Academy offers students various options for state-approved curriculum as well as academic and elective services using instructional funds provided by the charter school. With the support and guidance of a highly-qualified credentialed teacher, students build a customized learning plan based on individual educational goals. Teachers, students, and parents consistently collaborate to properly pace and design an instructional schedule to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. Excel Academy operates on a traditional school calendar with regularly scheduled holidays. Daily and weekly communication occurs between teachers, parents, and students to ensure academic progress as well as support for social and emotional success. In addition, families meet in person at least once every 20 school days to review assigned work, discuss student learning, celebrate successes, and set goals for the upcoming learning period (LP). Excel Academy believes in fostering strong educational partnerships between the school, parents, students, and stakeholders through continued communication, collaboration, and transparency.

Students enrolled in this school reside in urban, suburban, and rural areas throughout Orange, Riverside, and San Diego Counties. Excel Academy serves a diverse community of students and parents due to the nature of independent study. On CBEDS day 2022-23, Excel Academy Charter School- Warner reported an enrollment of 1048 students. This includes the enrollment of 39% socio-economically disadvantaged, 2.1% English Learners, 9.3% Special Education, 0% Homeless, and .1% Foster Youth. 28.8% of students enrolled in Excel Academy Charter School - Warner are Hispanic.

Mission Statement
Excel Academy will provide a flexible, personalized learning experience where teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student.

Our Vision
Life is what you create….at Excel Academy we bring students to LIFE through:

LEARNING: At Excel Academy students progress in knowledge, ability and social/emotional foundations. Curriculum and staff will provide a personalized learning plan inherent to the uniqueness of every student and learning situation. Excel Academy pursues a learning environment where every student will be challenged by, enjoy, and help direct their own education.

INDEPENDENCE: Excel Academy believes one of the key elements of an optimal education is to prepare each student for real-life complexities and independent learning. Excel Academy's curriculum options not only align to California's academic content standards but offer alternative and supplemental learning resources that place the student in a climate where curiosity and exploration are rewarded.

FLEXIBILITY: Flexible pacing enables each Excel Academy student, under the guidance of the teacher of record, to target individual needs without the demands of a classroom. By developing an awareness of their own unique learning style and advancement in their communication abilities, students and families will be enabled to discover their greatest areas of need and direct their efforts accordingly.

EMPOWERMENT: Excel Academy strives to empower students to take ownership of their education and develop not only the appropriate knowledge, skills, and abilities, but also the confidence, creativity, and discipline to help them adapt to challenges and opportunities.

Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Excel Academy Charter School is most proud of the following:

1) This year, the California Distinguished Schools program recognized Excel Academy for their excellent work in closing the achievement gap and achieving exceptional student performance.

2) The dedication of the EACS staff has proven to ensure consistent and valued communication between all educational partners. The number one priority is the success of the students academically, socially, and emotionally. With systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the recent LCAP survey results, parents and students agree that Excel Academy is dedicated to providing an education that denotes excellence.

Parent/Guardian survey results:
93.8% of survey respondents "agree" that the overall school organization lends itself to efficiency and student achievement.
98.4% of the survey respondents “agree” that EACS provides students access to rigorous core content curriculum and resources for students to access and master grade level standards.
97% of the survey respondents “agree” that EACS and teachers clearly communicate academic expectations and encourage academic excellence.
97.4% of survey respondents “agree” that their child’s school has developed a partnership with them to support their child’s academic learning and achievement.

Student survey results:
100% of student survey respondents "agree" their Teacher of Record (ToR) is available to speak with them when they need guidance.
99.9% of student survey respondents "agree" that the ToR cares about their education and is committed to helping them succeed.
96.9% of student survey respondents "agree" the curriculum provides challenging grade level instruction and assessment of their academic progress.

3) Excel Academy offered a plethora of opportunities to build student engagement and peer connections through monthly Outdoor Classroom days where students collaborated on hands-on experiments tied to content standards, virtual learning lessons across all core subjects, and field trips throughout Southern California. In addition, Social Emotional Learning Lessons for students in grades K-12 were led by credentialed teachers and allowed students to connect with peers to learn important life skills. Excel Academy piloted a mental wellness survey for students in grades 7-12, and provided Care Solace to better support mental health of the educational partners. In addition, the Gifted Learner Program was launched and successfully well received. EACS students flourished as participants in the theater, Coder-Z, e-Sports, and Student Council programs.

4) Excel Academy's local assessment, i-Ready diagnostic benchmark assessments, were administered to measure student progress in the fall, winter, and spring during the 2022-2023 school year. Based on an analysis of our i-Ready fall and spring scores in ELA and Math, our school demonstrated success in decreasing the percentages of students in tiers 2 & 3 (one or more grade levels below the current grade level). 78.8% of our students are at or above grade level in ELA. Tier 1 (students at or above grade level) grew by 12% since the first diagnostic in September. 72.6% of our students are at or above grade level in math. Tier 1 (students at or above grade level) grew by 21% since the first diagnostic in September. Excel Academy attributes the progress and success to the consistent support and guidance of our

credentialed teachers, communication between teachers, students, and parents, the consistent completion of the i-Ready personalized lessons, and the interventions in place to provide specific
resources, supplements, and live instruction to close learning gaps and strengthen skills.

5) Our students in the "What I Need" WIN intervention program showed tremendous growth in six months after retaking the i-Ready assessments. In ELA, 67% of students showed 1+ years growth, and 58% in math. Progress has been made to implement additional classes to serve students who need focus on early reading and foundational math support during the 2023-24 school year.

6) English Learners were provided with grade level appropriate weekly live instruction in reading, writing, listening, and speaking to build English language fluency. The students enjoyed the sessions and we are looking forward to seeing the progress they have made on the Summative ELPAC score reports.

7) Excel Academy's 87.2% graduation rate, 0% suspension and expulsion rates, and low chronic absenteeism rate of 1.0% is a success we are very proud of!

8) In addition to continuing to increase the school's A-G course offerings, Excel Academy continued to focus on increasing access to A-G courses with an emphasis on our 9th and 10th grade students. With great success, all core A-G required coursework is accessible for A-G completion. We introduced additional support for struggling students to meet Algebra 1 requirements and all students are are on track to complete the next math sequence.

We will maintain or build on our educational partner engagement success by:

1) Excel Academy will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and providing resources, support, and opportunities for all students to continue to grow as lifelong learners. Excel Academy will survey educational partners for feedback, and analyze the areas that we can maintain and improve upon.

2) Excel Academy will continue to offer opportunities for students to build rapport with peers while learning to enhance their social emotional well being through lessons and conversations.

3) Excel Academy will continue to assess students using i-Ready diagnostic benchmark assessments and encourage completion of personalized lessons to help strengthen skills and close learning gaps. In addition, Excel Academy will continue to provide grade level test prep packets, virtual test prep sessions, and practice tests to help prepare students for state testing. At Excel Academy, our goal is to strive for 100% participation in all areas of assessment.

4) Our English Learners will continue to be provided with the required English Language Development (ELD) curriculum and mandatory live instruction to help build English fluency in reading, writing, listening, and speaking.

5) Excel Academy will maintain and build on our high school graduation success by focusing on supporting students to achieve their goal of high school graduation through continual monitoring of student data to identify students who are struggling and provide interventions to assist students in overcoming barriers so they can be successful and stay on track to complete courses and graduate.

6) The High School Department is working to establish a more transparent A-G tracking system through our school information system for 2023-24.

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

Excel Academy's administration will review the i-Ready and CAASPP data and create a plan to improve any areas that indicate low performance among student groups. In addition, Excel Academy's Intervention Department has provided the necessary resources and support, including live instruction, to students who recently scored in tier 2 and tier 3 on the spring i-Ready assessments. The team has also made it a priority to finalize the interventions and live instruction that will be in place for students who scored in tier 2 and tier 3 (one plus grade levels below the current grade levels) on i-Ready for the 23/24 school year. Our goal is to make sure that all students have the necessary interventions in place to progress and thrive in our model when school resumes.

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

Goal 1: Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. With a focus on supporting our students to achieve, the goal, along with the actions and services, focuses on monitoring each student's academic achievement. It is our top priority to continually monitor student data to identify struggling students and provide targeted interventions knowing this plays an integral role in preventing learning gaps and fostering student success. i-Ready, CAASPP, ELPAC, and end of course assessments are all metrics we monitor to ensure students are on track for graduation.

Goal 2: Excel Academy will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students maintain active engagement to learn and improve their performance. We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal, as well as the actions and services, focuses on student, family, and teacher engagement and connectedness in an effort to attain a high average daily attendance and ongoing student engagement in learning.

Goal 3: Excel Academy will establish connections and partnerships with our families and the school community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement. Effective, meaningful, and transparent communication provides all educational partners opportunities for input regarding policy and program improvement. Building strong connections with students and parents leads to increased student engagement and achievement. Increasing the number of parent input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and community partners.

Goal 4: Excel Academy will ensure that students are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all stakeholders will help ensure proper support is in place to prepare high school students for required internal and state assessments. The goal, as well as the actions and services, focuses on monitoring each student's progress toward graduation and ensuring preparedness for college and career. Continual monitoring of student data to identify struggling students and interventions is central to keeping students on-track with course completion and their 4-Year Plan towards graduation. Graduation Rate, College/Career Prepared, CTE participation, and CAASPP scores are all metrics we monitor to ensure students are on track to graduation and to achieve their post-graduation goals.

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable to Excel Academy Charter School - Warner

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable to Excel Academy Charter School - Warner

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable to Excel Academy Charter School - Warner

Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Excel Academy Charter School is focused on providing effective and meaningful communication that will provide all educational partners opportunities for input in decision making that concerns the education of our students and the quality of our school program. Communication about opportunities to provide input is provided through social media platforms, including Beehively, as well as during SSC, ELAC, and PAC meetings. There were 304 participants in our LCAP Parent Input Survey with a 28% increase in survey respondents from the 2022/23 school year. 96.1% of survey respondents agree that EACS provides opportunities for parents to give input and participate in the school and child's education. Excel Academy shared the survey results with educational partners on 5/4/2023 and in our prior newsletters.

Meetings for the Annual Review of the LCAP Goals and actions/services to determine their effectiveness and any modifications that would need to be made in order to improve our school program:

Approach to engaging our Educational Partners:
The scheduling of LCAP input meetings were planned in collaboration with our educational partners.

Timeline of Process:
Staff: Staff and department meetings are held and the EACS team is engaged in the review of the school wide goals to provide input prior to the approval of the LCAP. LCAP surveys are provided to the entire staff and survey results are reviewed and shared.
Leadership Team: Monthly cabinet meetings were held.

Collaboration topics:
Excel Academy's mission and vision
Increase parent understanding for the need of student assessments and participation
Expand CTE classes
Focus on providing interventions and helping students set academic and personal goals
Professional development within all departments: general education (elementary and high school), assessment and special programs, interventions, and Special Education

ELAC: 9/7/2022, 11/2/2022, 2/1/2023, 5/3/2023
SSC: 9/13/2022, 11/3/2022, 2/2/2023, 5/4/2023
PAC: 11/1/2022, 5/1/2023
SELPA Approval: June 2023 submitted
School Board LCAP Draft Public Hearing: 6/15/2023
School Board LCAP Adoption Public Meeting: 6/22/2023

A summary of the feedback provided by specific educational partners.

Analysis of educational partner input (ideas, trends, or inputs):

The results of the Excel Academy Charter School (EACS) stakeholder input surveys provided our staff with an opportunity to identify trends in what stakeholders are saying about EACS and to collaborate on best practices to continue to support student success.

Educational Partner Input:
96.7% of survey respondents "agree" that EACS' vision and mission are clear and understandable.
93.8% of survey respondents "agree" that the overall school organization lends itself to efficiency and student achievement.
98.4% of the survey respondents “agree” that EACS provides students access to rigorous core content curriculum and resources for students to access and master grade level standards.
97% of the survey respondents “agree” that EACS and teachers clearly communicate academic expectations and encourage academic excellence.
93.4% of survey respondents “agree” that their student(s) set personal academic achievement goals.
93% of the survey respondents “agree” that the WIN (What I Need) intervention program provides the supplemental support that helps students improve in academic areas they may be struggling with.
92.4% of survey respondents "agree" that EACS uses assessment data to modify and monitor curriculum and instruction of students.
92.1% of survey respondents “agree” that they feel connected to the school, valued and respected.
97% of survey respondents “agree” that they feel safe and welcome to meet with their child’s teachers or school staff to discuss student progress.
97% of survey respondents “agree” that there is regular communication of their student’s progress.
97.4% of survey respondents “agree” that their child’s school has developed a partnership with them to support their child’s academic learning and achievement.
95.4% of survey respondents “agree” that the school demonstrates good effort in providing opportunities for involvement and input.
98% of high school parent survey respondents “agree” that the school provides support for high school students to be on the correct path to graduate from high school and become college and career ready.
97% of high school parent survey respondents “agree” that the school provides opportunities for high school students to participate in CTE courses or graduation pathways.
95.7% of survey respondents overall agree that the school supports students in their academic goals.
96.1% of survey respondents overall agree that the school provides opportunities for parents to give input and participate in student’s education.

In response to the survey input, the Director of Assessment and Accountability shared the survey results with educational partners to address trends in the input. The response to input was shared during the ELAC and SSC meetings in May, in addition with the staff in March and educational partners in the April and May newsletters. There was no input that directly affected the LCAP goals and actions besides helpful suggestions to help strengthen the programs that are offered. The most consistent trend we found was praise for our school and appreciation for all of the resources provided to families. Sample responses include:

Educational Partner Input Trends:
"I am so pleased and impressed with Excel. I appreciate the team of teachers and professionals that have made our transition from a brick and mortar school to a virtual school so seamless. Our Teacher of Record is extremely responsive and creative in her supports to our family. Thank you!"
"Excel Academy staff is excellent!"
"Please continue with this outstanding approach to education, it is greatly appreciated!"
"Our ToR has been so instrumental in my daughters successes. I couldn't be more grateful for her!"
"I really appreciate your Vision and Mission statements. They are in alignment with what our family believes what educational institutions should be aiming."
"I believe we have everything possible with Excel to achieve my children's success in learning and can't think of anything else we may need in order to reach our goals."

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

How the educational partner input influenced the development of the LCAP:
There was no input that directly affected the LCAP goals and actions.
The response to input was shared during the ELAC and SSC meetings in May, in addition with the staff in March and educational partners in the April and May newsletters.
Program Review: Prior to the finalization of the LCAP, stakeholders participated in a review of the LCAP draft during the ELAC and SSC meetings. The feedback consisted of clarifying questions about the program and overall support of our school and its programs.

Goals and Actions

Goal

Goal #	Description
1	Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.

An explanation of why the LEA has developed this goal.

Broad Goal:
With a focus on supporting student achievement, the goal and our actions/services focus on monitoring each student's academic achievement. Continual monitoring of student data to identify struggling students and interventions is important to the success of our students and helps prevent learning gaps. The metrics we utilize to ensure students are on track for graduation include i-Ready, CAASPP, and ELPAC.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in ELA CAASPP in 2020-21. A baseline will be developed from 2021-22 CAASPP data.	2021-2022 CAASPP Overall ELA Scores - Warner 66% met or exceeded grade level standard 22% standard nearly met 12% standard not met		Increase the number of students that have met or exceeded grade level proficiency by 2% each year.
CAASPP Math Increase the number of students that have met or exceeded grade level proficiency	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in math CAASPP in 2020-21.	2021-2022 CAASPP Overall Math Scores - Warner 54% met or exceeded grade level standard		Increase the number of students that have met or exceeded grade level proficiency by 2% each year.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
by 2% each year.		A baseline will be developed from 2021-22 CAASPP data.	26% standard nearly met 20% standard not met		
i-Ready ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready ELA Fall Scores ALL Tier 1: 65.7% Tier 2: 23.6% Tier 3: 10.7% English Learners Tier 1: 39.5% Tier 2: 32.6% Tier 3: 27.9% Economically Disadvantaged Tier 1: 55.7% Tier 2: 26% Tier 3: 18.3% Students w/ IEPs Tier 1: 34.8% Tier 2: 31.9% Tier 3: 33.3%	2022 i-Ready ELA Spring Scores ALL Tier 1: 80.5% Tier 2: 13.8% Tier 3: 5.7% English Learners Tier 1: 76.7% Tier 2: 6.7% Tier 3: 16.7% Economically Disadvantaged Tier 1: 74.9% Tier 2: 17.5% Tier 3: 7.7% Students w/ IEPs Tier 1: 50.5% Tier 2: 21.6% Tier 3: 27.8%	2023 i-Ready ELA Spring Scores ALL Tier 1: 78.8% Tier 2: 13.2% Tier 3: 7.9% English Learners Tier 1: 47.4% Tier 2: 36.8% Tier 3: 15.8% Economically Disadvantaged Tier 1: 73.4% Tier 2: 16.8% Tier 3: 9.8% Students with IEPs Tier 1: 49.3% Tier 2: 17.8% Tier 3: 32.9%		Decrease Tier III percentage by 2% each year
i-Ready Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready Math Fall Scores ALL Tier 1: 52.6% Tier 2: 34.4%% Tier 3: 13%	2022 i-Ready Math Spring Scores ALL Tier 1: 74.2% Tier 2: 17.7% Tier 3: 8.1%	2023 i-Ready Math Spring Scores ALL Tier 1: 72.6% Tier 2: 18.3% Tier 3: 9.1%		Decrease Tier III percentage by 2% each year

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	English Learners Tier 1: 36.4% Tier 2: 45.5% Tier 3: 18.2% Economically Disadvantaged Tier 1: 40.6% Tier 2: 38.1% Tier 3: 21.3% Students w/ IEPs Tier 1: 31.9% Tier 2: 26.4% Tier 3: 41.7%	English Learners Tier 1: 63.3% Tier 2: 30% Tier 3: 6.7% Economically Disadvantaged Tier 1: 68.5% Tier 2: 20.8% Tier 3: 10.7% Students w/ IEPs Tier 1: 48% Tier 2: 18.4% Tier 3: 33.7%	English Learners Tier 1: 68.4% Tier 2: 21.1% Tier 3: 10.5% Economically Disadvantaged Tier 1: 68% Tier 2: 20.9% Tier 3: 11% Students with IEPs Tier 1: 37.5% Tier 2: 23.6% Tier 3: 38.9%		
Increase ELPAC levels annually	A baseline will be developed from 2021-22 Summative ELPAC data.	Summative ELPAC results will be published by the state in the summer or fall of 2022.	Summative ELPAC results will be published by the state in the summer or fall of 2023.		Increase ELPAC proficiency by 2% each year.
State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with 2021 local indicator outcomes.	Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.	Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.		Excel Academy will maintain implementation and sustainability of the State Standards against the CDE State Standards Reflection Tool.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.	Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.		
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach		Maintain 100% of teachers are appropriately credentialed for the courses they teach
State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials		Excel Academy will maintain the availability of online, textbook, and teacher created curriculum to meet the individual needs of our students

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Achievement	1.1 Excel Academy will increase the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in language arts and mathematics through a database system that collects individual formative and summative data. Data collection and analysis includes statewide and internal assessments as measured by the Dashboard and accountability systems.		No
1.2	Student Monitoring	1.2 Monitor low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments to review student learner outcomes and ensure academic success as well as social and emotional wellness, or refer to the RTI, SST, or IEP team. Offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.		Yes
1.3	Broad Course of Study	1.3. All students have access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels assisting students in completing standards-aligned content. • Online courses, credit recovery, core programs • Supplemental curriculum and materials supporting Common Core Standards • Extended School year • Curriculum aligned to Common Core • English Language Development (ELD) curriculum	$11,849,528.00	No
1.4	Professional Development	1.4 Professional development opportunities for teachers and administrators to equip them with information and resources to better serve students and parents, for example, tools for goal setting and	$96,360.00	No

Action #	Title	Description	Total Funds	Contributing
		curriculum pacing, identifying, supporting, and monitoring students in the "What I Need" (WIN) and English Language Development (ELD) program. Professional development through organizations such as CSSA (California Charter School Association), CSDC (Charter School Development Center) and APLUS+.		
1.5	Parent Training	1.5 Provide parent training, learning opportunities, and workshops on a variety of topics, for example, explaining the EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and ToR parent training.		Yes
1.6	Grade Level Curriculum and Instruction	1.6 Students will be provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.		No
1.7	Student Monitoring and Support	1.7 Identify, support, and monitor students performing one or more years below grade level through the "What I Need" (WIN) intervention program. Students are required to participate in weekly intervention programs that are monitored by the credentialed ToR (Teacher of Record). Students who are performing below grade level on the fall i-Ready assessments will be required to take the mid-year i-Ready assessment(s).	$60,910.00	Yes
1.8	Needs Assessment and Data Analysis	1.8 Use data analysis and historical tracking of performance on internal and state testing to drive our policies, curriculum, and program decisions.	$9,600.00	No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 1 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness of 1.1: Excel Academy increased the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in English language arts and mathematics.
Effectiveness of 1.2: Excel Academy monitored low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on local assessments to review student learner outcomes and ensure academic success. In addition, Excel Academy successfully implemented and offered programs to promote academic growth as well as social-emotional learning (SEL) and awareness and character building. Students attended the offered sessions and connected with their peers.
Effectiveness of 1.3: All students were provided access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels and were assisted, supported, and guided in completing standards-aligned content by their assigned Teacher of Record (ToR).
Effectiveness of 1.4: The staff has attended professional development throughout the year to provide best practices and services to serve students and parents. Students and parents are provided with the necessary information, resources, and support to meet the individual needs of the student.
Effectiveness of 1.5: Parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and ToR parent training were provided to all parents.
Effectiveness of 1.6: Students were provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.
Effectiveness of 1.7: Students performing one or more years below grade level through the What I Need (WIN) intervention program were monitored throughout the school year and provided with individualized support. Students were required to participate in weekly intervention programs that are monitored by the credentialed ToR. Students who were performing below grade level on the fall i-Ready assessments were required to take the mid-year i-Ready assessment(s).
Effectiveness of 1.8: Excel Academy has analyzed and tracked the historical i-Ready data to drive our policies, curriculum, and program decisions. The results have influenced the decision to target specific students who need live instruction and additional curriculum and

resources to meet targeted goals. The effectiveness of 1.8 relates to the effectiveness of 1.7 because this targeted analysis provided the intervention department with the data to identify students who were performing below grade level and who needed the additional support. Once the CAASPP data is collected from 2023, the data will be analyzed and the staff will determine the domains that need to be targeted within ELA and math across specific grade levels.

Impact on Student Learning: Students have benefited academically from the increase of support provided by EACS teachers and intervention teams. They have observed an increase in student performance on the i-Ready local assessment, strong CAASPP baseline results, and graduation rates. They have also observed an increase in student participation in interventions and services to support academic achievement.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
2	We will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.

An explanation of why the LEA has developed this goal.

Maintenance Goal:
We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal and actions/services are focused on student, family, and teacher engagement and connectedness to attain a high average daily attendance.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Maintain or decrease Chronic Absenteeism rate of .01%	A baseline will be developed from 2020-21 data	Cumulative Enrollment: 1189, Chronic Absenteeism Count: 6, Chronic Absenteeism Rate: 0.5%	Cumulative Enrollment: 1048, Chronic Absenteeism Count: 14, Chronic Absenteeism Rate: 1.0%		Maintain an Absenteeism Rate of .01% or less
Strive for 0% Expulsion Rate each year	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate		Maintain 0% Expulsion Rate
Strive for 0% Suspension Rate each year	0% Suspension Rate	0% Suspension Rate	0% Suspension Rate		Maintain 0% Suspension Rate

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach		Maintain 100% of teachers are appropriately credentialed for the courses they teach.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	School Climate and Student Engagement	2.1 Focus on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides.	$52,202.00	No
2.2	Certificated and Classified Salaries and Benefits	2.2 Recruit and retain highly qualified multiple and single-subject teachers and classified staff, maintaining appropriate assignments and remaining competitive with salary and benefits.	$161,382.00	No
2.3	Educational Partner Communication	2.3 Frequent communication with parents/students to notify them of school events, opportunities, and resources through Beehively, email, the school website, and social media platforms. We will build partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.	$24,241.00	No

Action #	Title	Description	Total Funds	Contributing
2.4	Technology	2.4 Purchase technological devices and provide professional development to promote student engagement and develop 21st Century skills and support access to instruction as needed.	$132,000.00	No
2.5	Professional Development	2.5 Professional development in cultural awareness.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 2 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 2.1: Excel Academy focused on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides. Excel Academy is transparent in terms of making sure that parents and guardians are aware of the policies, procedures, and requirements that are in place.
Effectiveness 2.2: Excel Academy recruited and retained highly qualified multiple and single-subject teachers and classified staff, and was able to maintain appropriate assignments and competitive salaries and benefits.
Effectiveness 2.3: Excel Academy provided frequent communication with parents/guardians/students by notifying them of school events, opportunities, and resources through our main communication platform called Beehively, emails, the school website, and social media platforms. Excel Academy built partnerships for student outcomes by sending notification of surveys, parent informational meetings (i.e. ELAC, SSC, and PAC), and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.
Effectiveness 2.4: Excel Academy focused on purchasing technological devices and provided professional development to promote student engagement, support, and access to instruction as needed.

Effectiveness 2.5: Excel Academy focused on providing cultural awareness by inviting students and parents to share about their cultures and traditions during ELAC and SSC meetings which increased meeting attendance and helped to foster cultural awareness.

Impact on Student Learning: There has been an increase in student attendance, in addition to an increase of student participation in SEL lessons, ELD Live, and WIN intervention classes. Attendance and the interventions in place supported progress in both ELA and mathematics as indicated by internal data results.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
3	We will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.

An explanation of why the LEA has developed this goal.

Maintenance Goal:
Establishing connections and partnerships in education with our students and parents correlates with students attending school more regularly, earning higher grades, and graduating from high school. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2020-2021 Maintain or increase by 2%	Year 1 Outcome - 2021-2022 220 Responses from Educational Partners There were more responses that impacted the overall percentages. With a 96% and 98% approval rate, Excel Academy is excelling in all areas mentioned below.	Year 2 Outcome - 2022-2023 304 Responses from Educational Partners There were more responses that impacted the overall percentages. Excel Academy is excelling in all areas mentioned below.		Maintain or increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 6: Overall Satisfaction Rate Survey Results Maintain or increase by 2% each year	Overall Satisfaction Report: Based on 66 responses from parents/guardians 97.6% of survey respondents agree that the school has supported students attaining their academic goals. 98.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.	Overall Satisfaction Report: Based on 220 responses from parents/guardians 96.4% of survey respondents agree that the school has supported students attaining their academic goals. 98.2% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.2% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.	Overall Satisfaction Report: Based on 304 responses from parents/guardians 95.7% of survey respondents agree that the school has supported students attaining their academic goals. 96.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.4% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.		Maintain or increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Safety Plan Review and Training	Annual Review/Updates and Training Dates	The school safety plan was last reviewed and updated with staff in March of 2022.	The school safety plan was last reviewed and updated with staff in March of 2023.		Annual Review and Training Date

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Educational Partner Engagement	3.1 We will seek parent input and assess our level of educational partner engagement through parent participation in LP, ELAC, SSC, and PAC meetings, surveys, and Student Council, SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have opportunities for participation and input.		No
3.2	Educational Partner Partnerships	3.2 We will engage our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success.	$414,540.00	Yes
3.3	School Climate	3.3 We will build relationships by ensuring that all parents, students, and teachers feel that our schools are providing a safe, positive, inclusive, and welcoming learning environment.	$65,748.00	No
3.4	Student Services	3.4 Properly vet all newly hired Content and Community Providers to ensure standards alignment and safety for our students.	$61,286.00	No

Action #	Title	Description	Total Funds	Contributing
3.5	School Climate and School Safety	3.5 The charter will continue to maintain a safe learning environment for all students by training the teachers and staff on school-wide safety plans.		No
3.6	Communication and Translation Services	3.6 Notices, reports, statements, or records sent to a student, parent, or guardian will be translated as needed. Documents, records, and statements will be sent upon request by clerical staff.	$6,308.00	Yes
3.7	School Operating Services	3.7 Operations of the charter are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 3 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 3.1: Excel Academy sought out parent input and assessed our level of educational partner engagement through parent participation in Learning Period (LP), ELAC, SSC, and PAC meetings, surveys, Student Council, and SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have had opportunities for participation and input.
Effectiveness 3.2: Excel Academy engaged our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success. EACS built partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely

manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.
Effectiveness 3.3: Based on the survey results and stakeholder feedback, Excel Academy successfully built relationships by ensuring that all parents, students, and teachers felt that our school provided a safe, positive, inclusive, and welcoming learning environment.
Effectiveness 3.4: Excel Academy properly vetted all newly hired Content and Community Providers to ensure standards alignment and safety for our students were met at all times.
Effectiveness 3.5: Excel Academy maintains a safe learning environment for all students by training the teachers and staff on school-wide safety plans. The school-wide safety plans are updated as deemed necessary and appropriate and shared with stakeholders to provide transparency and accountability. The safety plan may be viewed upon request. The school safety plan ensures emergency preparedness at learning period meetings, test sites, field trips, staff meetings, and at the school office. It also encompasses required trainings and school expectations in regards to a mandated reporter, sexual harassment, blood borne pathogens, and active shooters. The expectations of conduct for students, parents, guardians, and staff, bullying and hate crime reporting are also included.
Effectiveness 3.6: Excel Academy notices, reports, statements, or records sent to a student, parent, or guardian were translated as needed and upon request. Documents, records, and statements were sent upon request by clerical staff.
Effectiveness 3.7: Operations of Excel Academy are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.

Impact on Student Learning: Increase in participation on the LCAP/WASC feedback survey for all educational partners. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships. EACS recognizes a continued need to increase parent participation in SSC, ELAC and PAC meetings.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
4	We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all educational partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.

An explanation of why the LEA has developed this goal.

Broad Goal:
With a focus on supporting our students to achieve their goal of high school graduation and college and career preparedness, the goal and actions/services focuses on monitoring each student's progress toward graduation. The continual monitoring of student data to identify struggling students and interventions is important to the success of our students staying on-track with course completion and on course to graduation. Graduation rate, college/career preparedness, and CTE participation are all metrics we monitor to ensure students are on track to graduate and to achieve their post-graduation goals.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Graduation Rate Dropout Rate	Develop a baseline from 2020-21 data.	2020-21: 89.7% Graduation Rate 2020-21: 4.8% Dropout Rate	2021-22: 87.2%Graduation Rate 2021-22: Dropout Rate		Increase the graduation rate by 2%
Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU prepared	2020-21: Number of Students participating in CTE: 27	2021-22: Number of Students participating in CTE: 9		Increase the % of College/Career Prepared students by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Access to a Broad Curriculum: College/Career Prepared Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	2019-20 Graduates completed all courses for UC/CSU Admission: 0	2020-21: Students enrolled in UC/CSU required courses for admission: 49.03% Completed All Courses Required for UC/CSU Admission: 0	2021-22: Students enrolled in UC/CSU required courses for admission: 84 Completed All Courses Required for UC/CSU Admission: 1		Increase the A-G course participation and completion annually by 2% to increase the College/Career Prepared Rate

Actions

Action #	Title	Description	Total Funds	Contributing
4.1	College and Career Readiness and Career Technical Education	4.1 Consistent with California College and Career Indicators, develop a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals; continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.	$16,000.00	No
4.2	High School Graduation	4.2 Students transitioning from middle to high school will be monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.	$208,431.00	No
4.3	High School Curriculum and Instruction	4.3 Provide high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.	$625,124.00	No

Action #	Title	Description	Total Funds	Contributing
4.4	Testing	4.4 Ensure all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities.	$148,970.00	Yes
4.5	Testing	4.5 Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.		Yes
4.6	A-G and Career Technical Education Courses	4.6 Expand our A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.	$31,730.00	No
4.7	Needs Assessment - Data Analysis	4.7 Analyze 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Provide targeted interventions and resources to students identified as needing additional support.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 4 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 4.1: Consistent with California College and Career Indicators, Excel Academy has developed a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals, and continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.
Effectiveness 4.2: Students transitioning from middle to high school are monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.
Effectiveness 4.3: Excel Academy provides high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Excel Academy works to review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.
Effectiveness 4.4: Excel Academy ensures all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities. Grade level test prep packets in ELA and math, the teacher led performance task prep sessions, and practice tests are designed to assist students in preparation for testing.
Effectiveness 4.5: Excel Academy covers the Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.
Effectiveness 4.6: Excel Academy is working to expand A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.
Effectiveness 4.7: Excel Academy analyzes 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Excel Academy provides targeted interventions and resources to students identified as needing additional support.

Impact on Student Learning: 84 students enrolled in UC/CSU required courses for admission. Excel Academy removed barriers such as Advanced Placement exam costs for low income and foster-youth students experiencing financial hardship, and observed greater student interest in Advanced Placement (AP), CTE, and A-G courses. The continued goal is to increase enrollment in these courses.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2023-24]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
772,374	0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
6.98%	0.00%	$0.00	6.98%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

As provided in the Academic Achievement metrics sections, the ELA i-Ready Diagnostic results demonstrate that:
2023 i-Ready ELA Spring Scores

ALL

Tier 1: 78.8%

Tier 2: 13.2%

Tier 3: 7.9%

English Learners

Tier 1: 47.4%

Tier 2: 36.8%

Tier 3: 15.8%

Economically Disadvantaged
Tier 1: 73.4%
Tier 2: 16.8%
Tier 3: 9.8%

Students with IEPs
Tier 1: 49.3%
Tier 2: 17.8%
Tier 3: 32.9%

As provided in the Academic Achievement metrics sections, the math i-Ready Diagnostic results demonstrate that:
2023 i-Ready Math Spring Scores
ALL
Tier 1: 72.6%
Tier 2: 18.3%
Tier 3: 9.1%

English Learners
Tier 1: 68.4%
Tier 2: 21.1%
Tier 3: 10.5%

Economically Disadvantaged

Tier 1: 68%

Tier 2: 20.9%

Tier 3: 11%

Students with IEPs

Tier 1: 37.5%

Tier 2: 23.6%

Tier 3: 38.9%

How the action(s) intend to meet the needs of students served by the action:

To address these needs in reference to the data, Excel Academy Charter School is focused on increasing the quality and quantity of services by actively using data systems to engage in in-depth analysis of student records, local and state assessment data to accurately assess student progress and develop appropriate interventions and accelerations to support Low Income pupils, Foster Youth, English Learners, and Students With Disabilities to support academic success or refer to the RTI, SST or IEP team.

Excel Academy Charter School's LCAP is focused on providing services and support for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) with the use of supplemental funding that is directed toward unduplicated students to increase and improve services for students who are low income, English Learners, foster youth, and/or homeless. Through educational partner collaboration and input, and the review of our local assessments, data was analyzed to address specific identified student needs and learning gaps. Actions and services were identified to determine the appropriate and effective use of funds to meet the needs and improve the outcomes for all students.

Goal 1 focuses on providing quality curricula to students and using assessments in reading and math to ensure they are meeting the state standards. Action 1.4 focuses on improving the quality of services through relevant and ongoing professional development that addresses topics such as goal setting, creating pacing guides and best practices for supporting high school students. This action is important for the success of all students, but is particularly important to the achievement of English Learners, foster youth, low-income students, and students with disabilities (SWDs). Action 1.5 focuses on improving services in quality by providing parent training and workshops to equip parents in all aspects of education, including expectations and requirements, choosing a standards-based curriculum, and how to locate school-sponsored field trips and approved community partners to help enrich the learning experience. ELAC meetings are held regularly to support parents in understanding the ELD (English Language Development) curriculum, accessing resources, and ensuring they are informed about the reclassification process. This is effective in meeting the needs of these subgroups because when parents are engaged and informed, they are more likely to take advantage of the resources offered and provide valuable input which leads to improved services for their

students. Action 1.7 focuses on monitoring and supporting students in the What I Need (WIN) program. Teachers receive updated training each year and monitor students in the program weekly. This action benefits our underrepresented students because if they are behind grade level they receive personalized intervention lessons to fill in learning gaps and support progress in their grade-level curriculum. This ensures that these students receive individualized attention and do not fall behind.

Goal 3 targets community-building among all of our educational partners. To best support student growth and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs), we strive to foster engagement, involvement, and satisfaction so that all educational partners have input in school policy and program decisions. Action 3.6 ensures that important materials, documents, and conversations are translated for our EL students and their families. This helps cultivate a sense of collaboration and guards against confusion and misunderstanding.

Our actions and services in Goal 4 increase services by monitoring students as they transition into high school and ensuring that they stay on course with their 4-Year Plan. Action 4.4 ensures that all students, and especially our English Learners, students with disabilities (SWD), foster youth and low-income students have access to test preparation materials to support student achievement on the CAASPP and i-Ready assessments. This results in higher achievement for all students. Action 4.5 is in place to make sure that foster youth and low income students have the opportunity to take AP examinations regardless of their financial status. This is effective because it is an attempt to remove any barriers low income students might have to college and career readiness.

All of our goals and actions were created with all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) in mind. It is our deepest desire that each of these student groups would receive the attention and support needed to ensure their emotional and academic success. We are confident these actions will be effective in helping our school meet the goals set for these student groups because our data supports that clear communication with families, ongoing teacher communication, encouragement and support, and access to academic intervention have a significant impact in increasing student engagement and achievement. With the help of staff, teacher and parent feedback, we have been able to identify the actions that will be most effective in closing learning gaps and making certain that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) feel connected to their school and its personnel.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Services for our low-income, English Learners, and foster youth are targeted interventions that were identified through a collaborative effort with the school's Executive Director, Director of Assessment and Accountability, Assistant Director of Intervention, High School Principal, and High School Counselors. The goals and actions in the LCAP are focused on increasing services and improving the quality of the academic

support to improve student performance, educational partner engagement, and the level of college and career readiness of our student groups. Through a collaborative effort, the school leadership team, taking into account the feedback provided from all educational partners, identified the next steps to growth towards each of our goals. We expect to see improvement in student engagement and achievement as reflected in i-Ready and CAASPP test scores, and an increase in our graduation and college and career readiness rate.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	N/A	N/A
Staff-to-student ratio of certificated staff providing direct services to students	N/A	N/A

2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$13,656,560.00	$246,890.00		$60,910.00	$13,964,360.00	$8,596,553.00	$5,367,807.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Achievement	All					
1	1.2	Student Monitoring	English Learners Foster Youth Low Income					
1	1.3	Broad Course of Study	All	$11,849,528.00				$11,849,528.00
1	1.4	Professional Development	All	$13,200.00	$83,160.00			$96,360.00
1	1.5	Parent Training	English Learners					
1	1.6	Grade Level Curriculum and Instruction	All					
1	1.7	Student Monitoring and Support	English Learners Foster Youth Low Income				$60,910.00	$60,910.00
1	1.8	Needs Assessment and Data Analysis	All	$9,600.00				$9,600.00
2	2.1	School Climate and Student Engagement	All	$52,202.00				$52,202.00
2	2.2	Certificated and Classified Salaries and Benefits	All	$161,382.00				$161,382.00
2	2.3	Educational Partner Communication	All	$24,241.00				$24,241.00
2	2.4	Technology	All		$132,000.00			$132,000.00
2	2.5	Professional Development	All					

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
3	3.1	Educational Partner Engagement	All					
3	3.2	Educational Partner Partnerships	English Learners Foster Youth Low Income	$414,540.00				$414,540.00
3	3.3	School Climate	All	$65,748.00				$65,748.00
3	3.4	Student Services	All	$61,286.00				$61,286.00
3	3.5	School Climate and School Safety	All					
3	3.6	Communication and Translation Services	English Learners	$6,308.00				$6,308.00
3	3.7	School Operating Services	All					
4	4.1	College and Career Readiness and Career Technical Education	All	$16,000.00				$16,000.00
4	4.2	High School Graduation	All	$208,431.00				$208,431.00
4	4.3	High School Curriculum and Instruction	All	$625,124.00				$625,124.00
4	4.4	Testing	English Learners Foster Youth Low Income	$148,970.00				$148,970.00
4	4.5	Testing	Foster Youth Low Income					
4	4.6	A-G and Career Technical Education Courses	All		$31,730.00			$31,730.00
4	4.7	Needs Assessment - Data Analysis	All					

2023-24 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
11,069,130	772,374	6.98%	0.00%	6.98%	$569,818.00	0.00%	5.15 %	**Total:**	$569,818.00
								LEA-wide Total:	$569,818.00
								Limited Total:	$0.00
								Schoolwide Total:	$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	**1.2**	Student Monitoring	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		
1	**1.4**	Professional Development				All Schools	$13,200.00	
1	**1.5**	Parent Training	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners	All Schools		
1	**1.7**	Student Monitoring and Support	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		
3	**3.2**	Educational Partner Partnerships	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$414,540.00	
3	**3.6**	Communication and Translation Services	Yes	LEA-wide	English Learners	All Schools	$6,308.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
4	4.4	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$148,970.00	
4	4.5	Testing	Yes	LEA-wide	Foster Youth Low Income	All Schools		

2022-23 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	$10,607,675.00	$0.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	**1.1**	Student Achievement	No		
1	**1.2**	Student Monitoring	Yes		
1	**1.3**	Broad Course of Study	No	$5,453,947.00	
1	**1.4**	Professional Development	No	$59,972.00	
1	**1.5**	Parent Training	Yes		
1	**1.6**	Grade Level Curriculum and Instruction	No		
1	**1.7**	Student Monitoring and Support	Yes	$334,699.00	
1	**1.8**	Needs Assessment and Data Analysis	No	$26,450.00	
2	**2.1**	School Climate and Student Engagement	No	$47,390.00	
2	**2.2**	Certificated and Classified Salaries and Benefits	No	$4,221,353.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.3	Educational Partner Communication	No	$5,607.00	
2	2.4	Technology	No	$54,370.00	
2	2.5	Professional Development	No		
3	3.1	Educational Partner Engagement	No		
3	3.2	Educational Partner Partnerships	Yes	$122,315.00	
3	3.3	School Climate	No	$10,000.00	
3	3.4	Student Services	No	$52,000.00	
3	3.5	School Climate and School Safety	No		
3	3.6	Communication and Translation Services	Yes	$7,500.00	
3	3.7	School Operating Services	No		
4	4.1	College and Career Readiness and Career Technical Education	No	$16,000.00	
4	4.2	High School Graduation	No	$173,572.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	**4.3**	High School Curriculum and Instruction	No		
4	**4.4**	Testing	Yes	$22,500.00	
4	**4.5**	Testing	Yes		
4	**4.6**	A-G and Career Technical Education Courses	No		
4	**4.7**	Needs Assessment - Data Analysis	No		

2022-23 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
	$324,699.00	$0.00	$0.00	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.2	Student Monitoring	Yes				
1	1.5	Parent Training	Yes				
1	1.7	Student Monitoring and Support	Yes	$294,699.00			
3	3.2	Educational Partner Partnerships	Yes				
3	3.6	Communication and Translation Services	Yes	$7,500.00			
4	4.4	Testing	Yes	$22,500.00			
4	4.5	Testing	Yes				

2022-23 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
		0	0.00%	$0.00	0.00%	0.00%	$0.00	0.00%

Instructions

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Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [*EC*] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (*EC* Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (*EC* Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).

    - Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the "Red" or "Orange" performance category or any local indicator where the LEA received a "Not Met" or "Not Met for Two or More Years" rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the "all student*"* performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified**: Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools**: Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness**: Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc/.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:
For county offices of education and school districts only, verify the LEA:

a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.

b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.

d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.

e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: "A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP."

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

Prompt 2: "A summary of the feedback provided by specific educational partners."

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: "A description of the aspects of the LCAP that were influenced by specific input from educational partners."

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, "aspects" of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.

- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.

- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)
Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal
Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal
Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals
In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.

- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:
For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric**: Indicate how progress is being measured using a metric.
- **Baseline**: Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome**: When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome**: When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome**: When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24**: When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2022–23**. Leave blank until then.	Enter information in this box when completing the LCAP for **2023–24**. Leave blank until then.	Enter information in this box when completing the LCAP for **2024–25**. Leave blank until then.	Enter information in this box when completing the LCAP for **2021–22** or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

> ***Actions for English Learners:*** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.
>
> ***Actions for Foster Youth***: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

***Projected Percentage to Increase or Improve Services for the Coming School Year*:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 *CCR* Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

> After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])
>
> In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])
>
> These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Consistent with the requirements of 5 *CCR* Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
    - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
    - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
    - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
    - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
    - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
    - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
    - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
    - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
    - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
    - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

      The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
    - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022

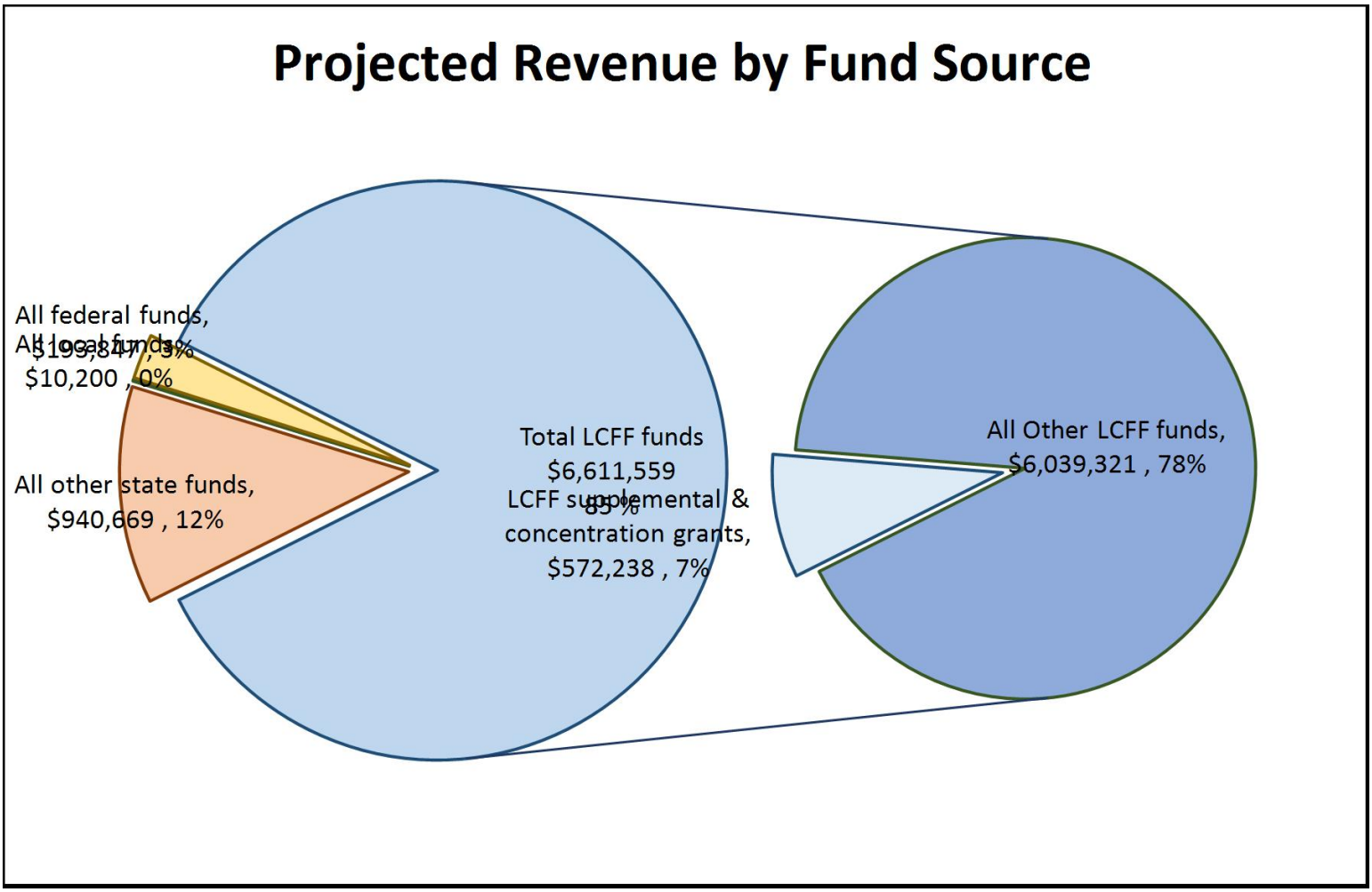
LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Excel Academy Charter School - Helendale
CDS Code: California
School Year: 2023-24
LEA contact information:
Heidi Gasca
Executive Director

(949) 412-3122

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

Budget Overview for the 2023-24 School Year

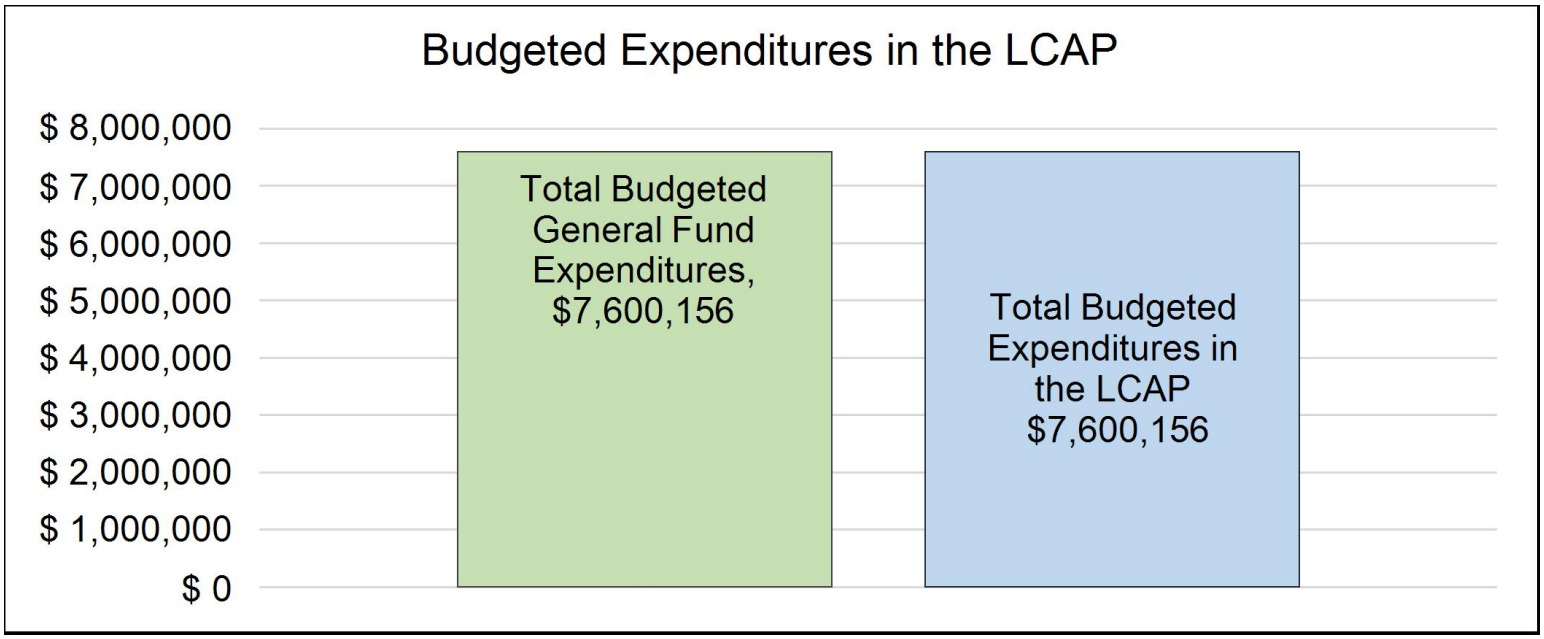


This chart shows the total general purpose revenue Excel Academy Charter School - Helendale expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Excel Academy Charter School - Helendale is $7,756,275, of which $6,611,559 is Local Control Funding Formula (LCFF), $940,669 is other state funds, $10,200 is local funds, and $193,847 is federal funds. Of the $6,611,559 in LCFF Funds, $572,238 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Excel Academy Charter School - Helendale plans to spend for 2023-24. It shows how much of the total is tied to planned actions and services in the LCAP.

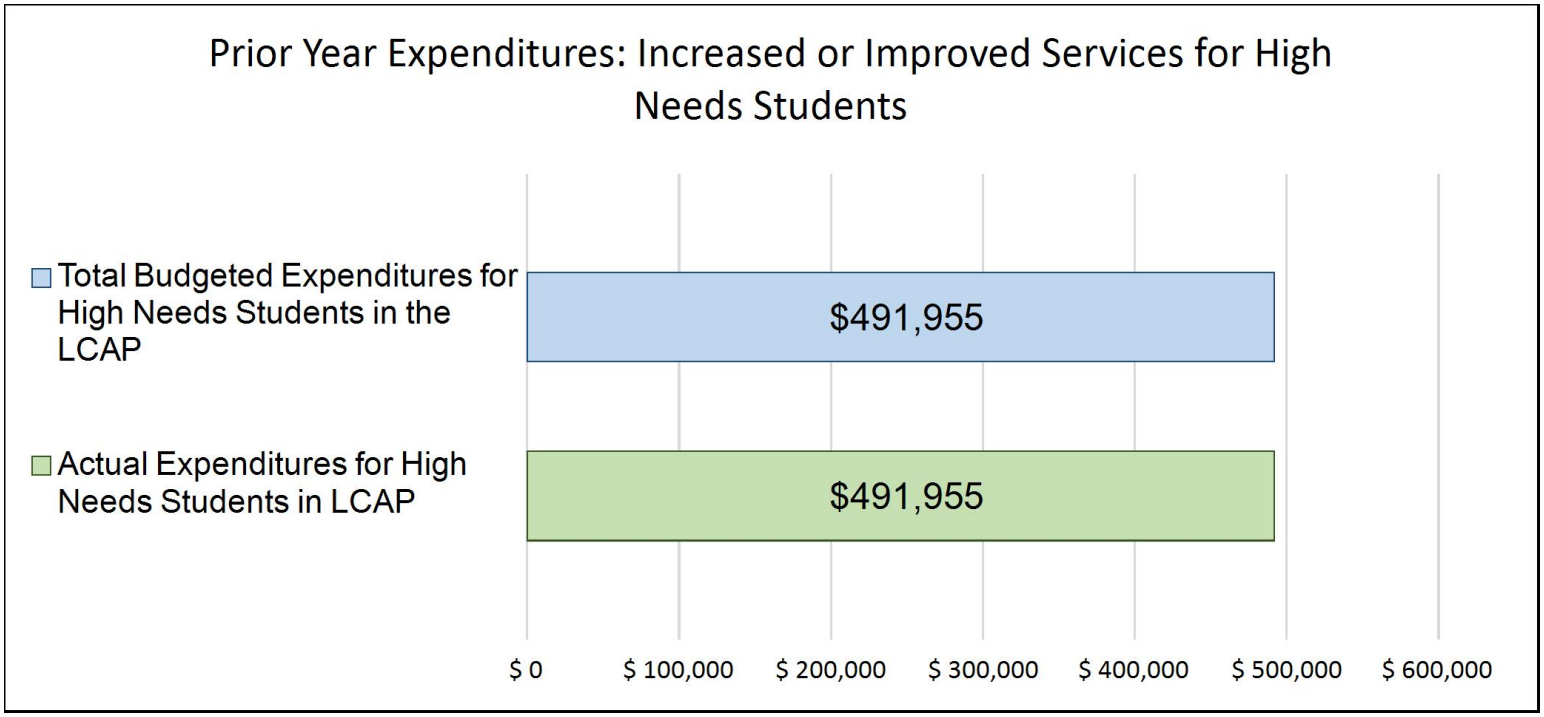
The text description of the above chart is as follows: Excel Academy Charter School - Helendale plans to spend $7,600,156 for the 2023-24 school year. Of that amount, $7,600,156 is tied to actions/services in the LCAP and $0 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Excel Academy Charter School - Helendale is projecting it will receive $572,238 based on the enrollment of foster youth, English learner, and low-income students. Excel Academy Charter School - Helendale must describe how it intends to increase or improve services for high needs students in the LCAP. Excel Academy Charter School - Helendale plans to spend $572,238 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2022-23



This chart compares what Excel Academy Charter School - Helendale budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Excel Academy Charter School - Helendale estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2022-23, Excel Academy Charter School - Helendale's LCAP budgeted $491,955 for planned actions to increase or improve services for high needs students. Excel Academy Charter School - Helendale actually spent $491,955 for actions to increase or improve services for high needs students in 2022-23.

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Helendale	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

Plan Summary [2023-24]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Excel Academy Charter School is an non-classroom based California charter school offering a tuition-free personalized learning independent study model for students in grades TK-12 . Our high-quality, educational program is rooted in flexible learning, personalized schedules, and proven systems of support where credentialed teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student. Excel Academy is accredited by the Western Association of Schools and Colleges (WASC) which is a statement to the community and educational partners that the institution is reputable, student oriented, focused on quality education and student performance, and is committed to ongoing improvement. Excel Academy offers students various options for state-approved curriculum as well as academic and elective services using instructional funds provided by the charter school. With the support and guidance of a highly-qualified credentialed teacher, students build a customized learning plan based on individual educational goals. Teachers, students, and parents consistently collaborate to properly pace and design an instructional schedule to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. Excel Academy operates on a traditional school calendar with regularly scheduled holidays. Daily and weekly communication occurs between teachers, parents, and students to ensure academic progress as well as support for social and emotional success. In addition, families meet in person at least once every 20 school days to review assigned work, discuss student learning, celebrate successes, and set goals for the upcoming learning period (LP). Excel Academy believes in fostering strong educational partnerships between the school, parents, students, and stakeholders through continued communication, collaboration, and transparency.

Students enrolled in this school reside in urban, suburban, and rural areas throughout San Bernardino, Los Angeles, Kern, and Inyo counties. Excel Academy serves a diverse community of students and parents due to the nature of independent study. On CBEDS day 2022-23, Excel Academy Charter School- Helendale reported an enrollment of 545 students. This includes the enrollment of 49.9% socio-economically disadvantaged, 3.1% English Learners, 9.7% Special Education, .5% Homeless, and .1% Foster Youth. 47.3% of students enrolled in Excel Academy Charter School- Helendale are Hispanic.

Mission Statement:

Excel Academy will provide a flexible, personalized learning experience where teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student.

Our Vision
Life is what you create….at Excel Academy we bring students to LIFE through:

LEARNING: At Excel Academy students progress in knowledge, ability and social/emotional foundations. Curriculum and staff will provide a personalized learning plan inherent to the uniqueness of every student and learning situation. Excel Academy pursues a learning environment where every student will be challenged by, enjoy, and help direct their own education.

INDEPENDENCE: Excel Academy believes one of the key elements of an optimal education is to prepare each student for real-life complexities and independent learning. Excel Academy's curriculum options not only align to California's academic content standards but offer alternative and supplemental learning resources that place the student in a climate where curiosity and exploration are rewarded.

FLEXIBILITY: Flexible pacing enables each Excel Academy student, under the guidance of the teacher of record, to target individual needs without the demands of a classroom. By developing an awareness of their own unique learning style and advancement in their communication abilities, students and families will be enabled to discover their greatest areas of need and direct their efforts accordingly.

EMPOWERMENT: Excel Academy strives to empower students to take ownership of their education and develop not only the appropriate knowledge, skills, and abilities, but also the confidence, creativity, and discipline to help them adapt to challenges and opportunities.

Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Excel Academy Charter School is most proud of the following:

1) This year, the California Distinguished Schools program recognized Excel Academy for their excellent work in closing the achievement gap and achieving exceptional student performance.

2) The dedication of the EACS staff has proven to ensure consistent and valued communication between all educational partners. The number one priority is the success of the students academically, socially, and emotionally. With systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the recent LCAP survey results, parents and students agree that Excel Academy is dedicated to providing an education that denotes excellence.

Parent/Guardian survey results:
93.8% of survey respondents "agree" that the overall school organization lends itself to efficiency and student achievement.
98.4% of the survey respondents “agree” that EACS provides students access to rigorous core content curriculum and resources for students to access and master grade level standards.
97% of the survey respondents “agree” that EACS and teachers clearly communicate academic expectations and encourage academic excellence.
97.4% of survey respondents “agree” that their child’s school has developed a partnership with them to support their child’s academic learning and achievement.

Student survey results:
100% of student survey respondents "agree" their Teacher of Record (ToR) is available to speak with them when they need guidance.
99.9% of student survey respondents "agree" that the ToR cares about their education and is committed to helping them succeed.
96.9% of student survey respondents "agree" the curriculum provides challenging grade level instruction and assessment of their academic progress.

3) Excel Academy offered a plethora of opportunities to build student engagement and peer connections through monthly Outdoor Classroom days where students collaborated on hands-on experiments tied to content standards, virtual learning lessons across all core subjects, and field trips throughout Southern California. In addition, Social Emotional Learning Lessons for students in grades K-12 were led by credentialed teachers and allowed students to connect with peers to learn important life skills. Excel Academy piloted a mental wellness survey for students in grades 7-12, and provided Care Solace to better support mental health of the educational partners. In addition, the Gifted Learner Program was launched and successfully well received. EACS students flourished as participants in the theater, Coder-Z, e-Sports, and Student Council programs.

4) Excel Academy's local assessment, i-Ready diagnostic benchmark assessments, were administered to measure student progress in the fall, winter, and spring during the 2022-2023 school year. Based on an analysis of our i-Ready fall and spring scores in ELA and Math, our

school demonstrated success in decreasing the percentages of students in tiers 2 & 3 (one or more grade levels below the current grade level). 76.3% of our students are at or above grade level in ELA. Tier 1 (students at or above grade level) grew by 12% since the first diagnostic in September. 68.8% of our students are at or above grade level in math. Tier 1 (students at or above grade level) grew by 20% since the first diagnostic in September. Excel Academy attributes the progress and success to the consistent support and guidance of our credentialed teachers, communication between teachers, students, and parents, the consistent completion of the i-Ready personalized lessons, and the interventions in place to provide specific
resources, supplements, and live instruction to close learning gaps and strengthen skills.

5) Our students in the "What I Need" WIN intervention program showed tremendous growth in six months after retaking the i-Ready assessments. In ELA, 49% of students showed 1+ years growth, and 53% in math. Progress has been made to implement additional classes to serve students who need focus on early reading and foundational math support during the 2023-24 school year.

6) English Learners were provided with grade level appropriate weekly live instruction in reading, writing, listening, and speaking to build English language fluency. The students enjoyed the sessions and we are looking forward to seeing the progress they have made on the Summative ELPAC score reports.

7) Excel Academy's 100% graduation rate, 0% suspension and expulsion rates, and a low chronic absenteeism rate of 1.1% is a success we are very proud of!

8) In addition to continuing to increase the school’s A-G course offerings, Excel Academy continued to focus on increasing access to A-G courses with an emphasis on our 9th and 10th grade students. With great success, all core A-G required coursework is accessible for A-G completion. We introduced additional support for struggling students to meet Algebra 1 requirements and all students are are on track to complete the next math sequence.

We will maintain or build on our educational partner engagement success by:

1) Excel Academy will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and providing resources, support, and opportunities for all students to continue to grow as lifelong learners. Excel Academy will survey educational partners for feedback, and analyze the areas that we can maintain and improve upon.

2) Excel Academy will continue to offer opportunities for students to build rapport with peers while learning to enhance their social emotional well being through lessons and conversations.

3) Excel Academy will continue to assess students using i-Ready diagnostic benchmark assessments and encourage completion of personalized lessons to help strengthen skills and close learning gaps. In addition, Excel Academy will continue to provide grade level test prep packets, virtual test prep sessions, and practice tests to help prepare students for state testing. At Excel Academy, our goal is to strive for 100% participation in all areas of assessment.

4) Our English Learners will continue to be provided with the required English Language Development (ELD) curriculum and mandatory live instruction to help build English fluency in reading, writing, listening, and speaking.

5) Excel Academy will maintain and build on our high school graduation success by focusing on supporting students to achieve their goal of high school graduation through continual monitoring of student data to identify students who are struggling and provide interventions to assist students in overcoming barriers so they can be successful and stay on track to complete courses and graduate.

6) The High School Department is working to establish a more transparent A-G tracking system through our school information system for 2023-24.

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

Excel Academy's administration will review the i-Ready and CAASPP data and create a plan to improve any areas that indicate low performance among student groups. In addition, Excel Academy's Intervention Department has provided the necessary resources and support, including live instruction, to students who recently scored in tier 2 and tier 3 on the spring i-Ready assessments. The team has also made it a priority to finalize the interventions and live instruction that will be in place for students who scored in tier 2 and tier 3 (one plus grade levels below the current grade levels) on i-Ready for the 23/24 school year. Our goal is to make sure that all students have the necessary interventions in place to progress and thrive in our model when school resumes.

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

Goal 1: Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. With a focus on supporting our students to achieve, the goal, along with the actions and services, focuses on monitoring each student's academic achievement. It is our top priority to continually monitor student data to identify struggling students and provide targeted interventions knowing this plays an integral role in preventing learning gaps and fostering student success. i-Ready, CAASPP, ELPAC, and end of course assessments are all metrics we monitor to ensure students are on track for graduation.

Goal 2: Excel Academy will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students maintain active engagement to learn and improve their performance. We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal, as well as the actions and services, focuses on student, family, and teacher engagement and connectedness in an effort to attain a high average daily attendance and ongoing student engagement in learning.

Goal 3: Excel Academy will establish connections and partnerships with our families and the school community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement. Effective, meaningful, and transparent communication provides all educational partners opportunities for input regarding policy and program improvement. Building strong connections with students and parents leads to increased student engagement and achievement. Increasing the number of Parent Input Survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and community partners.

Goal 4: Excel Academy will ensure that students are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all stakeholders will help ensure proper support is in place to prepare high school students for required internal and state assessments. The goal, as well as the actions and services, focuses on monitoring each student's progress toward graduation and ensuring preparedness for college and career. Continual monitoring of student data to identify struggling students and interventions is central to keeping students on-track with course completion and their 4-Year Plan towards graduation. Graduation Rate, College/Career Prepared, CTE participation, and CAASPP scores are all metrics we monitor to ensure students are on track to graduation and to achieve their post-graduation goals.

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable to Excel Academy Charter School – Helendale

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable to Excel Academy Charter School – Helendale

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable to Excel Academy Charter School – Helendale

Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Excel Academy Charter School is focused on providing effective and meaningful communication that will provide all educational partners opportunities for input in decision making that concerns the education of our students and the quality of our school program. Communication about opportunities to provide input is provided through social media platforms, including Beehively, as well as during SSC, ELAC, and PAC meetings. There were 304 participants in our LCAP Parent Input Survey with a 28% increase in survey respondents from the 2022/23 school year. 96.1% of survey respondents agree that EACS provides opportunities for parents to give input and participate in the school and child's education. Excel Academy shared the survey results with educational partners on 5/4/2023 and in our prior newsletters.

Meetings for the Annual Review of the LCAP Goals and actions/services to determine their effectiveness and any modifications that would need to be made in order to improve our school program:

Approach to engaging our Educational Partners:
The scheduling of LCAP input meetings were planned in collaboration with our educational partners.

Timeline of Process:
Staff: Staff and department meetings are held and the EACS team is engaged in the review of the school wide goals to provide input prior to the approval of the LCAP. LCAP surveys are provided to the entire staff and survey results are reviewed and shared.
Leadership Team: Monthly cabinet meetings were held.

Collaboration topics:
Excel Academy's mission and vision
Increase parent understanding for the need of student assessments and participation
Expand CTE classes
Focus on providing interventions and helping students set academic and personal goals
Professional development within all departments: general education (elementary and high school), assessment and special programs, interventions, and Special Education

ELAC: 9/7/2022, 11/2/2022, 2/1/2023, 5/3/2023
SSC: 9/13/2022, 11/3/2022, 2/2/2023, 5/4/2023
PAC: 11/1/2022, 5/1/2023
SELPA Approval: June 2023 submitted
School Board LCAP Draft Public Hearing: 6/15/2023
School Board LCAP Adoption Public Meeting: 6/22/2023

A summary of the feedback provided by specific educational partners.

Analysis of educational partner input (ideas, trends, or inputs):

The results of the Excel Academy Charter School (EACS) stakeholder input surveys provided our staff with an opportunity to identify trends in what stakeholders are saying about EACS and to collaborate on best practices to continue to support student success.

Educational Partner Input:
96.7% of survey respondents "agree" that EACS' vision and mission are clear and understandable.
93.8% of survey respondents "agree" that the overall school organization lends itself to efficiency and student achievement.
98.4% of the survey respondents “agree” that EACS provides students access to rigorous core content curriculum and resources for students to access and master grade level standards.
97% of the survey respondents “agree” that EACS and teachers clearly communicate academic expectations and encourage academic excellence.
93.4% of survey respondents “agree” that their student(s) set personal academic achievement goals.
93% of the survey respondents “agree” that the WIN (What I Need) intervention program provides the supplemental support that helps students improve in academic areas they may be struggling with.
92.4% of survey respondents "agree" that EACS uses assessment data to modify and monitor curriculum and instruction of students.
92.1% of survey respondents “agree” that they feel connected to the school, valued and respected.
97% of survey respondents “agree” that they feel safe and welcome to meet with their child’s teachers or school staff to discuss student progress.
97% of survey respondents “agree” that there is regular communication of their student’s progress.
97.4% of survey respondents “agree” that their child’s school has developed a partnership with them to support their child’s academic learning and achievement.
95.4% of survey respondents “agree” that the school demonstrates good effort in providing opportunities for involvement and input.
98% of high school parent survey respondents “agree” that the school provides support for high school students to be on the correct path to graduate from high school and become college and career ready.
97% of high school parent survey respondents “agree” that the school provides opportunities for high school students to participate in CTE courses or graduation pathways.
95.7% of survey respondents overall agree that the school supports students in their academic goals.
96.1% of survey respondents overall agree that the school provides opportunities for parents to give input and participate in student’s education.

In response to the survey input, the Director of Assessment and Accountability shared the survey results with educational partners to address trends in the input. The response to input was shared during the ELAC and SSC meetings in May, in addition with the staff in March and educational partners in the April and May newsletters. There was no input that directly affected the LCAP goals and actions besides helpful suggestions to help strengthen the programs that are offered. The most consistent trend we found was praise for our school and appreciation for all of the resources provided to families. Sample responses include:

Educational Partner Input Trends:
"I am so pleased and impressed with Excel. I appreciate the team of teachers and professionals that have made our transition from a brick and mortar school to a virtual school so seamless. Our Teacher of Record is extremely responsive and creative in her supports to our family. Thank you!"
"Excel Academy staff is excellent!"
"Please continue with this outstanding approach to education, it is greatly appreciated!"
"Our ToR has been so instrumental in my daughters successes. I couldn't be more grateful for her!"
"I really appreciate your Vision and Mission statements. They are in alignment with what our family believes what educational institutions should be aiming."
"I believe we have everything possible with Excel to achieve my children's success in learning and can't think of anything else we may need in order to reach our goals."

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

How the educational partner input influenced the development of the LCAP:
There was no input that directly affected the LCAP goals and actions.
The response to input was shared during the ELAC and SSC meetings in May, in addition with the staff in March and educational partners in the April and May newsletters.
Program Review: Prior to the finalization of the LCAP, stakeholders participated in a review of the LCAP draft during the ELAC and SSC meetings. The feedback consisted of clarifying questions about the program and overall support of our school and its programs.

Goals and Actions

Goal

Goal #	Description
1	Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.

An explanation of why the LEA has developed this goal.

Broad Goal:
With a focus on supporting student achievement, the goal and our actions/services focus on monitoring each student's academic achievement. Continual monitoring of student data to identify struggling students and interventions is important to the success of our students and helps prevent learning gaps. The metrics we utilize to ensure students are on track for graduation include i-Ready, CAASPP, and ELPAC.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in ELA CAASPP in 2020-21. A baseline will be developed from 2021-22 CAASPP data.	2021-2022 CAASPP Overall ELA Scores - Helendale 59% met or exceeded grade level standard 23% standard nearly met 18% standard not met		Increase the number of students that have met or exceeded grade level proficiency by 2% each year.
CAASPP Math Increase the number of students that have met or exceeded	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in math CAASPP in 2020-21. A baseline will be	2021-2022 CAASPP Overall Math Scores - Helendale 48% met or exceeded grade level standard		Increase the number of students that have met or exceeded grade level proficiency by 2% each year.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
grade level proficiency by 2% each year.		developed from 2021-22 CAASPP data.	22% standard nearly met 30% standard not met		
i-Ready ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready ELA Fall Scores ALL Tier 1: 62.2% Tier 2: 23.7% Tier 3: 14.1% English Learners Tier 1: 42.9% Tier 2: 35.7% Tier 3: 21.4% Economically Disadvantaged Tier 1: 62.1% Tier 2: 18.6% Tier 3: 19.3% Students w/ IEPs Tier 1: 40% Tier 2: 27.5% Tier 3: 32.5%	2022 i-Ready ELA Spring Scores ALL Tier 1: 76% Tier 2: 15.2% Tier 3: 8.8% English Learners Tier 1: 65.2% Tier 2: 8.7% Tier 3: 26.1% Economically Disadvantaged Tier 1: 66.5% Tier 2: 21.9% Tier 3: 11.6% Students with IEPs Tier 1: 46.7% Tier 2: 20% Tier 3: 33.3%	2023 i-Ready ELA Spring Scores ALL Tier 1: 76.3% Tier 2: 13.1% Tier 3: 10.5% English Learners Tier 1: 56.3% Tier 2: 18.8% Tier 3: 25% Economically Disadvantaged Tier 1: 69.8% Tier 2: 16.5% Tier 3: 13.6% Students with IEPs Tier 1: 34.8% Tier 2: 19.6% Tier 3: 45.7%		Decrease Tier III percentage by 2% each year
i-Ready Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready Math Fall Scores ALL Tier 1: 47.4% Tier 2: 30.9% Tier 3: 21.7%	2022 i-Ready Math Spring Scores ALL Tier 1: 68.3% Tier 2: 19.6% Tier 3: 12.1%	2023 i-Ready Math Spring Scores ALL Tier 1: 68.8% Tier 2: 20.2% Tier 3: 11.1%		Decrease Tier III percentage by 2% each year

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	English Learners Tier 1: 51.9% Tier 2: 25.9% Tier 3: 22.2% Economically Disadvantaged Tier 1: 48.2% Tier 2: 26.6% Tier 3: 25.2% Students w/ IEPs Tier 1: 27.5% Tier 2: 22.5% Tier 3: 50%	English Learners Tier 1: 65.2% Tier 2: 17.4% Tier 3: 17.4% Economically Disadvantaged Tier 1: 62.6% Tier 2: 21.5% Tier 3: 15.9% Students with IEPs Tier 1: 39.7% Tier 2: 19% Tier 3: 41.4%	English Learners Tier 1: 75% Tier 2: 6.3% Tier 3: 18.8% Economically Disadvantaged Tier 1: 62.1% Tier 2: 25.5% Tier 3: 12.3% Students with IEPs Tier 1: 30.4% Tier 2: 19.6% Tier 3: 50%		
Increase ELPAC levels annually	A baseline will be developed from 2021-22 Summative ELPAC data.	Summative ELPAC results will be published by the state in the summer or fall of 2022.	Summative ELPAC results will be published by the state in the summer or fall of 2023.		Increase ELPAC proficiency by 2% each year.
State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with 2021 local indicator outcomes.	Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.	Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.		Excel Academy will maintain implementation and sustainability of the State Standards against the CDE State Standards Reflection Tool.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.	Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.		
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach		Maintain 100% of teachers are appropriately credentialed for the courses they teach
State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials		Excel Academy will maintain the availability of online, textbook, and teacher created curriculum to meet the individual needs of our students

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Achievement	1.1 Excel Academy will increase the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in language arts and mathematics through a database system that collects individual formative and summative data. Data collection and analysis includes statewide and internal assessments as measured by the Dashboard and accountability systems.		No
1.2	Student Monitoring	1.2 Monitor low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments to review student learner outcomes and ensure academic success as well as social and emotional wellness, or refer to the RTI, SST, or IEP team. Offer programs like the "What I Need" WIN intervention program to provide instruction and resources n to promote academic growth, in addition to social-emotional awareness classes and character building.		Yes
1.3	Broad Course of Study	1.3 All students have access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels assisting students in completing standards-aligned content. (All Students) • Online courses, credit recovery, core programs • Supplemental curriculum and materials supporting Common Core Standards • Extended School year • Curriculum aligned to Common Core • English Language Development (ELD) curriculum	$6,267,670.00	No
1.4	Professional Development	1.4 Professional development opportunities for teachers and administrators to equip them with information and resources to better serve students and parents, for example, tools for goal setting and	$49,640.00	No

Action #	Title	Description	Total Funds	Contributing
		curriculum pacing, identifying, supporting, and monitoring students in the "What I Need" (WIN) and English Language Development (ELD) program. Professional development through organizations such as CSSA (California Charter School Association), CSDC (Charter School Development Center) and APLUS+.		
1.5	Parent Training	1.5 Provide parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and ToR parent training.		Yes
1.6	Grade Level Curriculum and Instruction	1.6 Students will be provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.		No
1.7	Student Monitoring and Support	1.7 Identify, support, and monitor students performing one or more years below grade level through the "What I Need" (WIN) intervention program. Students are required to participate in weekly intervention programs that are monitored by the credentialed ToR (Teacher of Record). Students who are performing below grade level on the fall i-Ready assessments will be required to take the mid-year i-Ready assessment(s).	$31,378.00	Yes
1.8	Needs Assessment - Data Analysis	1.8 Use data analysis and historical tracking of performance on internal and state testing to drive our policies, curriculum, and program decisions.	$4,945.00	No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 1 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness of 1.1: Excel Academy increased the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in English language arts and mathematics.
Effectiveness of 1.2: Excel Academy monitored low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on local assessments to review student learner outcomes and ensure academic success. In addition, Excel Academy successfully implemented and offered programs to promote academic growth as well as social-emotional learning (SEL) and awareness and character building. Students attended the offered sessions and connected with their peers.
Effectiveness of 1.3: All students were provided access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels and were assisted, supported, and guided in completing standards-aligned content by their assigned Teacher of Record (ToR).
Effectiveness of 1.4: The staff has attended professional development throughout the year to provide best practices and services to serve students and parents. Students and parents are provided with the necessary information, resources, and support to meet the individual needs of the student.
Effectiveness of 1.5: Parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and ToR parent training were provided to all parents.
Effectiveness of 1.6: Students were provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.
Effectiveness of 1.7: Students performing one or more years below grade level through the What I Need (WIN) intervention program were monitored throughout the school year and provided with individualized support. Students were required to participate in weekly intervention programs that are monitored by the credentialed ToR. Students who were performing below grade level on the fall i-Ready assessments were required to take the mid-year i-Ready assessment(s).
Effectiveness of 1.8: Excel Academy has analyzed and tracked the historical i-Ready data to drive our policies, curriculum, and program decisions. The results have influenced the decision to target specific students who need live instruction and additional curriculum and

resources to meet targeted goals. The effectiveness of 1.8 relates to the effectiveness of 1.7 because this targeted analysis provided the intervention department with the data to identify students who were performing below grade level and who needed the additional support. Once the CAASPP data is collected from 2023, the data will be analyzed and the staff will determine the domains that need to be targeted within ELA and math across specific grade levels.

Impact on Student Learning: Students have benefited academically from the increase of support provided by EACS teachers and intervention teams. They have observed an increase in student performance on the i-Ready local assessment, strong CAASPP baseline results, and graduation rates. They have also observed an increase in student participation in interventions and services to support academic achievement.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
2	We will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.

An explanation of why the LEA has developed this goal.

Maintenance Goal:
We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal and actions/services are focused on student, family, and teacher engagement and connectedness to attain a high average daily attendance.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Maintain or decrease Chronic Absenteeism rate of .01%	A baseline will be developed from 2020-21 data	Cumulative Enrollment: 521, 8 Chronic Absenteeism Count, Chronic Absenteeism Rate: 1.5%	Cumulative Enrollment: 545, 7 Chronic Absenteeism Count, Chronic Absenteeism Rate: 1.1%		Maintain an Absenteeism Rate.of .01% or lower
Strive for 0% Expulsion Rate each year	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate		Maintain 0% Expulsion Rate
Strive for 0% Suspension Rate each year	0% Suspension Rate	0% Suspension Rate	0% Suspension Rate		Maintain 0% Suspension Rate

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach		Maintain 100% of teachers are appropriately credentialed for the courses they teach.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	School Climate and Student Engagement	2.1 Focus on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides.	$27,922.00	No
2.2	Certificated and Classified Salaries and Benefits	2.2 Recruit and retain highly qualified multiple and single-subject teachers and classified staff, maintaining appropriate assignments and remaining competitive with salary and benefits.	$83,136.00	No
2.3	Educational Partner Communication	2.3 Frequent communication with parents/students to notify them of school events, opportunities, and resources through Beehively, email, the school website, and social media platforms. We will build partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.	$12,488.00	No

Action #	Title	Description	Total Funds	Contributing
2.4	Technology	2.4 Purchase technological devices and provide professional development to promote student engagement and develop 21st Century skills and support access to instruction as needed.	$68,000.00	No
2.5	Professional Development	2.5 Professional development in cultural awareness.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 2 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 2.1: Excel Academy focused on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides. Excel Academy is transparent in terms of making sure that parents and guardians are aware of the policies, procedures, and requirements that are in place.
Effectiveness 2.2: Excel Academy recruited and retained highly qualified multiple and single-subject teachers and classified staff, and was able to maintain appropriate assignments and competitive salaries and benefits.
Effectiveness 2.3: Excel Academy provided frequent communication with parents/guardians/students by notifying them of school events, opportunities, and resources through our main communication platform called Beehively, emails, the school website, and social media platforms. Excel Academy built partnerships for student outcomes by sending notification of surveys, parent informational meetings (i.e. ELAC, SSC, and PAC), and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.
Effectiveness 2.4: Excel Academy focused on purchasing technological devices and provided professional development to promote student engagement, support, and access to instruction as needed.

Effectiveness 2.5: Excel Academy focused on providing cultural awareness by inviting students and parents to share about their cultures and traditions during ELAC and SSC meetings which increased meeting attendance and helped to foster cultural awareness.

Impact on Student Learning: There has been an increase in student attendance, in addition to an increase of student participation in SEL lessons, ELD Live, and WIN intervention classes. Attendance and the interventions in place supported progress in both ELA and mathematics as indicated by internal data results.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
3	We will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.

An explanation of why the LEA has developed this goal.

Maintenance Goal:
Establishing connections and partnerships in education with our students and parents correlates with students attending school more regularly, earning higher grades, and graduating from high school. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2020-2021 Maintain or increase by 2%	Year 1 Outcome - 2021-2022 220 Responses from Educational Partners There were more responses that impacted the overall percentages. With a 96% and 98% approval rate, Excel Academy is excelling in all areas mentioned below.	Year 2 Outcome - 2022-2023 304 Responses from Educational Partners There were more responses that impacted the overall percentages. Excel Academy is excelling in all areas mentioned below.		Maintain or Increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 6: Overall Satisfaction Rate Survey Results Maintain or increase by 2% each year	Overall Satisfaction Report: Based on 66 responses from parents/guardians 97.6% of survey respondents agree that the school has supported students attaining their academic goals. 98.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.	Overall Satisfaction Report: Based on 220 responses from parents/guardians 96.4% of survey respondents agree that the school has supported students attaining their academic goals. 98.2% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.2% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.	Overall Satisfaction Report: Based on 304 responses from parents/guardians 95.7% of survey respondents agree that the school has supported students attaining their academic goals. 96.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.4% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.		Maintain or Increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Safety Plan Review and Training	Annual Review/Updates and Training Dates	The school safety plan was last reviewed and updated with staff in March of 2022.	The school safety plan was last reviewed and updated with staff in March of 2023.		Annual Review and Training Date

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Educational Partner Engagement	3.1 We will seek parent input and assess our level of educational partner engagement through parent participation in LP, ELAC, SSC, and PAC meetings, surveys, and Student Council, SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have opportunities for participation and input.		No
3.2	Educational Partner Partnerships	3.2 We will engage our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success.	$213,551.00	Yes
3.3	School Climate	3.3 We will build relationships by ensuring that all parents, students, and teachers feel that our schools are providing a safe, positive, inclusive, and welcoming learning environment.	$33,870.00	No
3.4	Student Services	3.4 Properly vet all newly hired Content and Community Providers to ensure standards alignment and safety for our students.	$31,572.00	No
3.5	School Climate and School Safety	3.5 The charter will continue to maintain a safe learning environment for all students by training the teachers and staff on school-wide safety plans.		No

Action #	Title	Description	Total Funds	Contributing
3.6	Communication and Translating Services	3.6 Notices, reports, statements, or records sent to a student, parent, or guardian will be translated as needed. Documents, records, and statements will be sent upon request by clerical staff.	$3,250.00	Yes
3.7	School Operating Services	3.7 Operations of the charter are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 3 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 3.1: Excel Academy sought out parent input and assessed our level of educational partner engagement through parent participation in Learning Period (LP), ELAC, SSC, and PAC meetings, surveys, Student Council, and SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have had opportunities for participation and input.
Effectiveness 3.2: Excel Academy engaged educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success. EACS built partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.

Effectiveness 3.3: Based on the survey results and stakeholder feedback, Excel Academy successfully built relationships by ensuring that all parents, students, and teachers felt that our school provided a safe, positive, inclusive, and welcoming learning environment.
Effectiveness 3.4: Excel Academy properly vetted all newly hired Content and Community Providers to ensure standards alignment and safety for our students were met at all times.
Effectiveness 3.5: Excel Academy maintains a safe learning environment for all students by training the teachers and staff on school-wide safety plans. The school-wide safety plans are updated as deemed necessary and appropriate and shared with stakeholders to provide transparency and accountability. The safety plan may be viewed upon request. The school safety plan ensures emergency preparedness at learning period meetings, test sites, field trips, staff meetings, and at the school office. It also encompasses required trainings and school expectations in regards to a mandated reporter, sexual harassment, blood borne pathogens, and active shooters. The expectations of conduct for students, parents, guardians, and staff, bullying and hate crime reporting are also included.
Effectiveness 3.6: Excel Academy notices, reports, statements, or records sent to a student, parent, or guardian were translated as needed and upon request. Documents, records, and statements were sent upon request by clerical staff.
Effectiveness 3.7: Operations of Excel Academy are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.

Impact on Student Learning: Increase in participation on the LCAP/WASC feedback survey for all educational partners. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships. EACS recognizes a continued need to increase parent participation in SSC, ELAC and PAC meetings.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
4	We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all Educational Partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.

An explanation of why the LEA has developed this goal.

Broad Goal:
With a focus on supporting our students to achieve their goal of high school graduation and college and career preparedness, the goal and actions/services focuses on monitoring each student's progress toward graduation. The continual monitoring of student data to identify struggling students and interventions is important to the success of our students staying on-track with course completion and on course to graduation. Graduation rate, college/career preparedness, and CTE participation are all metrics we monitor to ensure students are on track to graduate and to achieve their post-graduation goals.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Graduation Rate Dropout Rate	Develop a baseline from 2020-21 data.	2020-21: 93.8% Graduation Rate 2020-21: 6.3% Dropout Rate	2021-22: 100% Graduation Rate 2021-22: 0% Dropout Rate		Increase the graduation rate by 2%
Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU preparedness	2020-21: Number of Students participating in CTE: 11	2021-22: Number of Students participating in CTE: 13		Increase the % of College/Career Prepared students by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Access to a Broad Curriculum: College/Career Prepared Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	2019-20 Graduates completed all courses for UC/CSU Admission: 0	2020-21: Students enrolled in UC/CSU required courses for admission: 54.43% Completed All Courses Required for UC/CSU Admission: 0	2021-22: Students enrolled in UC/CSU required courses for admission: 34 Completed All Courses Required for UC/CSU Admission: 0		Increase the A-G course participation and completion annually by 2% to increase the College/Career Prepared Rate

Actions

Action #	Title	Description	Total Funds	Contributing
4.1	College and Career Readiness and Career Technical Education	4.1 Consistent with California College and Career Indicators, develop a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals; continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.	$8,200.00	No
4.2	High School Graduation	4.2 Students transitioning from middle to high school will be monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.	$107,374.00	No
4.3	High School Curriculum and Instruction	4.3 Provide high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.	$322,034.00	No

Action #	Title	Description	Total Funds	Contributing
4.4	Testing	4.4 Ensure all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities.	$76,742.00	Yes
4.5	Testing	4.5 Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.		Yes
4.6	A-G and Career Technical Education Courses	4.6 Expand our A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.	$16,346.00	No
4.7	Needs Assessment - Data Analysis	4.7 Analyze 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Provide targeted interventions and resources to students identified as needing additional support.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 4 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 4.1: Consistent with California College and Career Indicators, Excel Academy has developed a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals, and continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.
Effectiveness 4.2: Students transitioning from middle to high school are monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.
Effectiveness 4.3: Excel Academy provides high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Excel Academy works to review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.
Effectiveness 4.4: Excel Academy ensures all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities. Grade level test prep packets in ELA and math, the teacher led performance task prep sessions, and practice tests are designed to assist students in preparation for testing.
Effectiveness 4.5: Excel Academy covers the Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.
Effectiveness 4.6: Excel Academy is working to expand A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.
Effectiveness 4.7: Excel Academy analyzes 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Excel Academy provides targeted interventions and resources to students identified as needing additional support.

Impact on Student Learning: 34 students enrolled in UC/CSU required courses for admission. Excel Academy removed barriers such as Advanced Placement exam costs for low income and foster-youth students experiencing financial hardship, and observed greater student interest in Advanced Placement (AP), CTE, and A-G courses. The continued goal is to increase enrollment in these courses.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2023-24]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
483,278.00	0.00

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
8.45%	0.00%	$0.00	8.45%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

As provided in the Academic Achievement metrics sections, the ELA i-Ready Diagnostic results demonstrate that:
2023 i-Ready ELA Spring Scores

ALL

Tier 1: 76.3%

Tier 2: 13.1%

Tier 3: 10.5%

English Learners

Tier 1: 56.3%

Tier 2: 18.8%

Tier 3: 25%

Economically Disadvantaged
Tier 1: 69.8%
Tier 2: 16.5%
Tier 3: 13.6%

Students with IEPs
Tier 1: 34.8%
Tier 2: 19.6%
Tier 3: 45.7%

As provided in the Academic Achievement metrics sections, the math i-Ready Diagnostic results demonstrate that:
2023 i-Ready Math Spring Scores
ALL
Tier 1: 68.8%
Tier 2: 20.2%
Tier 3: 11.1%

English Learners
Tier 1: 75%
Tier 2: 6.3%
Tier 3: 18.8%

Economically Disadvantaged

Tier 1: 62.1%

Tier 2: 25.5%

Tier 3: 12.3%

Students with IEPs

Tier 1: 30.4%

Tier 2: 19.6%

Tier 3: 50%

How the action(s) intend to meet the needs of students served by the action:

To address these needs in reference to the data, Excel Academy Charter School is focused on increasing the quality and quantity of services by actively using data systems to engage in in-depth analysis of student records, local and state assessment data to accurately assess student progress and develop appropriate interventions and accelerations to support Low Income pupils, Foster Youth, English Learners, and Students With Disabilities to support academic success or refer to the RTI, SST or IEP team.

Excel Academy Charter School's LCAP is focused on providing services and support for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) with the use of supplemental funding that is directed toward unduplicated students to increase and improve services for students who are low income, English Learners, foster youth, and/or homeless. Through educational partner collaboration and input, and the review of our local assessments, data was analyzed to address specific identified student needs and learning gaps. Actions and services were identified to determine the appropriate and effective use of funds to meet the needs and improve the outcomes for all students.

Goal 1 focuses on providing quality curricula to students and using assessments in reading and math to ensure they are meeting the state standards. Action 1.4 focuses on improving the quality of services through relevant and ongoing professional development that addresses topics such as goal setting, creating pacing guides and best practices for supporting high school students. This action is important for the success of all students, but is particularly important to the achievement of English Learners, foster youth, low-income students, and students with disabilities (SWDs). Action 1.5 focuses on improving services in quality by providing parent training and workshops to equip parents in all aspects of education, including expectations and requirements, choosing a standards-based curriculum, and how to locate school-sponsored field trips and approved community partners to help enrich the learning experience. ELAC meetings are held regularly to support parents in understanding the ELD (English Language Development) curriculum, accessing resources, and ensuring they are informed about

the reclassification process. This is effective in meeting the needs of these subgroups because when parents are engaged and informed, they are more likely to take advantage of the resources offered and provide valuable input which leads to improved services for their students. Action 1.7 focuses on monitoring and supporting students in the What I Need (WIN) program. Teachers receive updated training each year and monitor students in the program weekly. This action benefits our underrepresented students because if they are behind grade level they receive personalized intervention lessons to fill in learning gaps and support progress in their grade-level curriculum. This ensures that these students receive individualized attention and do not fall behind.

Goal 3 targets community-building among all of our educational partners. To best support student growth and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs), we strive to foster engagement, involvement, and satisfaction so that all educational partners have input in school policy and program decisions. Action 3.6 ensures that important materials, documents, and conversations are translated for our EL students and their families. This helps cultivate a sense of collaboration and guards against confusion and misunderstanding.

Our actions and services in Goal 4 increase services by monitoring students as they transition into high school and ensuring that they stay on course with their 4-Year Plan. Action 4.4 ensures that all students, and especially our English Learners, students with disabilities (SWD), foster youth and low-income students have access to test preparation materials to support student achievement on the CAASPP and i-Ready assessments. This results in higher achievement for all students. Action 4.5 is in place to make sure that foster youth and low income students have the opportunity to take AP examinations regardless of their financial status. This is effective because it is an attempt to remove any barriers low income students might have to college and career readiness.

All of our goals and actions were created with all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) in mind. It is our deepest desire that each of these student groups would receive the attention and support needed to ensure their emotional and academic success. We are confident these actions will be effective in helping our school meet the goals set for these student groups because our data supports that clear communication with families, ongoing teacher communication, encouragement and support, and access to academic intervention have a significant impact in increasing student engagement and achievement. With the help of staff, teacher and parent feedback, we have been able to identify the actions that will be most effective in closing learning gaps and making certain that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) feel connected to their school and its personnel.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Services for our low-income, English Learners, and foster youth are targeted interventions that were identified through a collaborative effort with the school's Executive Director, Director of Assessment and Accountability, Assistant Director of Intervention, High School Principal, and High School Counselors. The goals and actions in the LCAP are focused on increasing services and improving the quality of the academic support to improve student performance, educational partner engagement, and the level of college and career readiness of our student groups. Through a collaborative effort, the school leadership team, taking into account the feedback provided from all educational partners, identified the next steps to growth towards each of our goals. We expect to see improvement in student engagement and achievement as reflected in i-Ready and CAASPP test scores, and an increase in our graduation and college and career readiness rate.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	N/A	N/A
Staff-to-student ratio of certificated staff providing direct services to students	N/A	N/A

2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$7,215,507.00	$127,186.00		$15,425.00	$7,358,118.00	$4,420,193.00	$2,937,925.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Achievement	All					
1	1.2	Student Monitoring	English Learners Foster Youth Low Income					
1	1.3	Broad Course of Study	All	$6,267,670.00				$6,267,670.00
1	1.4	Professional Development	All	$6,800.00	$42,840.00			$49,640.00
1	1.5	Parent Training	English Learners Foster Youth Low Income					
1	1.6	Grade Level Curriculum and Instruction	All					
1	1.7	Student Monitoring and Support	English Learners Foster Youth Low Income	$15,953.00			$15,425.00	$31,378.00
1	1.8	Needs Assessment - Data Analysis	All	$4,945.00				$4,945.00
2	2.1	School Climate and Student Engagement	All	$27,922.00				$27,922.00
2	2.2	Certificated and Classified Salaries and Benefits	All	$83,136.00				$83,136.00
2	2.3	Educational Partner Communication	All	$12,488.00				$12,488.00
2	2.4	Technology	All		$68,000.00			$68,000.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
2	2.5	Professional Development	All					
3	3.1	Educational Partner Engagement	All					
3	3.2	Educational Partner Partnerships	English Learners Foster Youth Low Income	$213,551.00				$213,551.00
3	3.3	School Climate	All	$33,870.00				$33,870.00
3	3.4	Student Services	All	$31,572.00				$31,572.00
3	3.5	School Climate and School Safety	All					
3	3.6	Communication and Translating Services	English Learners	$3,250.00				$3,250.00
3	3.7	School Operating Services	All					
4	4.1	College and Career Readiness and Career Technical Education	All	$8,200.00				$8,200.00
4	4.2	High School Graduation	All	$107,374.00				$107,374.00
4	4.3	High School Curriculum and Instruction	All	$322,034.00				$322,034.00
4	4.4	Testing	English Learners Foster Youth Low Income	$76,742.00				$76,742.00
4	4.5	Testing	English Learners Foster Youth Low Income					
4	4.6	A-G and Career Technical Education Courses	All		$16,346.00			$16,346.00
4	4.7	Needs Assessment - Data Analysis	All					

2023-24 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
5,718,602	483,278.00	8.45%	0.00%	8.45%	$309,496.00	0.00%	5.41 %	**Total:**	$309,496.00
								LEA-wide Total:	$309,496.00
								Limited Total:	$0.00
								Schoolwide Total:	$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	**1.2**	Student Monitoring	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
1	**1.5**	Parent Training	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
1	**1.7**	Student Monitoring and Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$15,953.00	
3	**3.2**	Educational Partner Partnerships	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$213,551.00	
3	**3.6**	Communication and Translating Services	Yes	LEA-wide	English Learners	All Schools	$3,250.00	
4	**4.4**	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$76,742.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
4	**4.5**	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		

2022-23 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	$5,976,254.36	$0.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	**1.1**	Student Achievement	No		
1	**1.2**	Student Monitoring	Yes		
1	**1.3**	Broad Course of Study	No	$5,040,363.00	
1	**1.4**	Professional Development	No	$29,538.00	
1	**1.5**	Parent Training	Yes		
1	**1.6**	Grade Level Curriculum and Instruction	No		
1	**1.7**	Monitoring Student Performance	Yes	$165,150.00	
1	**1.8**	Needs Assessment - Data Analysis	No	$11,050.00	
2	**2.1**	School Climate and Student Engagement	No	$20,310.00	
2	**2.2**	Certificated and Classified Salaries and Benefits	No	$505,622.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.3	Educational Partner Communication	No	$2,403.00	
2	2.4	Technology	No	$26,779.00	
2	2.5	Professional Development	No		
3	3.1	Educational Partner Engagement	No		
3	3.2	Educational Partner Partnerships	Yes	$40,364.00	
3	3.3	School Climate	No	$4,500.00	
3	3.4	Student Services	No	$22,234.36	
3	3.5	School Climate and School Safety	No		
3	3.6	Communication and Translating Services	Yes	$3,250.00	
3	3.7	School Operating Services	No		
4	4.1	College and Career Readiness and Career Technical Education	No	$8,200.00	
4	4.2	High School Graduation	No	$85,491.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	**4.3**	High School Curriculum and Instruction	No		
4	**4.4**	Testing	Yes	$11,000.00	
4	**4.5**	Testing	Yes		
4	**4.6**	A-G and Career Technical Education Courses	No		
4	**4.7**	Needs Assessment - Data Analysis	No		

2022-23 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
	$179,400.00	$0.00	$0.00	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.2	Student Monitoring	Yes				
1	1.5	Parent Training	Yes				
1	1.7	Monitoring Student Performance	Yes	$165,150.00			
3	3.2	Educational Partner Partnerships	Yes				
3	3.6	Communication and Translating Services	Yes	$3,250.00			
4	4.4	Testing	Yes	$11,000.00			
4	4.5	Testing	Yes				

2022-23 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
		0.00	0.00%	$0.00	0.00%	0.00%	$0.00	0.00%

Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [*EC*] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (*EC* Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (*EC* Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).

    - Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the "Red" or "Orange" performance category or any local indicator where the LEA received a "Not Met" or "Not Met for Two or More Years" rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the "all student*"* performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified**: Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools**: Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness**: Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc/.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:
For county offices of education and school districts only, verify the LEA:

a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.

b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.

d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.

e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: "A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP."

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

Prompt 2: "A summary of the feedback provided by specific educational partners."

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: "A description of the aspects of the LCAP that were influenced by specific input from educational partners."

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, "aspects" of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.

- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.

- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)
Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal
Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal
Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals
In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.

- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:
For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric**: Indicate how progress is being measured using a metric.
- **Baseline**: Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome**: When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome**: When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome**: When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24**: When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2022–23**. Leave blank until then.	Enter information in this box when completing the LCAP for **2023–24**. Leave blank until then.	Enter information in this box when completing the LCAP for **2024–25**. Leave blank until then.	Enter information in this box when completing the LCAP for **2021–22** or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

> ***Actions for English Learners:*** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.
>
> ***Actions for Foster Youth***: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

***Projected Percentage to Increase or Improve Services for the Coming School Year*:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 *CCR* Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

> After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])
>
> In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])
>
> These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Consistent with the requirements of 5 *CCR* Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
    - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
    - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
    - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
    - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
    - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
    - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
    - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
    - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
    - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
    - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

      The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
    - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022

Coversheet

Proposed Budget 2023-2024

Section: XIV. Public Hearing
Item: B. Proposed Budget 2023-2024
Purpose: Discuss
Submitted by:
Related Material:
FY24 Adopted Budget Combined.pdf
FY24 Adopted Budget Helendale.pdf
FY24 Adopted Budget Warner.pdf
Helendale - EPA Expenditure Plan.pdf
Warner-EPA Expenditure Plan.pdf
Warner-EPA Expenditure Plan Agenda Item.pdf
Helendale - EPA Expenditure Plan Agenda Item.pdf
23-06-15 Adopted Budget Final.pptx.pdf
2023_Local_Control_and_Accountability_Plan_Excel_Academy_Charter_School_-_Helendale_20230608 FINAL.pdf
2023_Local_Control_and_Accountability_Plan_Excel_Academy_Charter_School_-_Warner_20230609 FINAL.pdf

BACKGROUND:

The members of the Board are requested to review and adopt the 2023/24 Proposed Budget on June 22, 2023, Board meeting. Before adopting the 2023-24 budget, it is necessary to hold a public hearing at this time in compliance with the terms outlined in the Memorandum of Understanding with the authorizing districts and Education Code 42103. This hearing will serve as an opportunity to ensure compliance and gather valuable input from the concerned stakeholders

This budget comprehensively represents the projected revenues and expenditures for the upcoming 2023-24 school year and the estimations for the subsequent 2024/25 and 2025/26 years. The revenue forecasts have been formulated by considering the governor's May revision of his initial budget proposal and our enrollment predictions spanning this three-year timeframe. Accordingly, the revenues and expenditure projections are guided by the principles outlined below:

- COLA - 8.22% for FY2023-24 and Zero for the next two year
- Project Enrollment of 1,650 and a 1% increase for the next two years
- Projected Attendance Rate (ADA) of 98%
- Unduplicated Pupil percentage of 47.75% for Helendale and 37.30% for Warner
- Step and Column Increase of 3% for FY2023-24
- STRS contribution rate of 19.10%

Our multi-year projection indicates our ability to maintain the minimum required reserve of 15% for economic uncertainties. Based on this, we are confident in receiving approval for our budget from the authorizing districts.

It is important to note that the budget will be periodically updated throughout the year during our First and Second Interim reporting periods. These updates will incorporate actual revenue and expenditure figures, as well as enrollment and attendance data, and any necessary adjustments stemming from changes to our assumptions.

Description	Adopted Budget FY2023-24 Combined	Adopted Budget FY2023-24 Combined	Adopted Budget FY2023-24 Combined
Enrollment - Projected	**1,650**	**1,667**	**1,683**
Average Daily Attendance (P-2 Projected)	**1,617**	**1,633**	**1,650**
COLA	**8.22%**	**0.00%**	**0.00%**
REVENUES:			
General Purpose Entitlement			
8011 General Purpose Block Grant	17,883,493	18,156,509	18,346,081
8012 Education Protection Account	323,386	326,620	329,886
8096 Funding in Lieu of Property Taxes	924,373	924,073	924,073
TTL General Purpose Entitlement	**19,131,252**	**19,407,202**	**19,600,040**
Federal Revenue			
8181 Federal IDEA SpEd Revenue	283,539	286,374	289,238
8290 Other Federal Revenue	253,594	256,130	258,691
TTL Federal Revenue	**537,133**	**542,504**	**547,929**
Other State Revenue			
8311 AB602 State SpEd Revenue	1,226,320	1,238,583	1,250,969
8550 Mandated Cost Reimbursements	41,704	42,122	42,543
8560 State Lottery Revenue	383,229	387,061	390,932
8590 Other State Revenue	1,149,950	1,161,450	1,173,064
TTL Other State Revenue	**2,801,203**	**2,829,216**	**2,857,508**
Other Local Revenue			
8660 Interest Income	30,000	30,000	30,000
8699 Other Revenue	0	0	0
8980 Contributions to Restricted Programs	0	0	0
TTL Other Local Revenue	**30,000**	**30,000**	**30,000**
TTL REVENUES	**22,499,588**	**22,808,922**	**23,035,477**

EXPENDITURES:			
1000 - Certificated Salaries			
1100 Teacher Compensation	6,631,098	6,796,875	6,932,813
1200 Student Support	831,618	852,408	869,457
1300 Certificated Administrators	1,597,086	1,637,013	1,669,753
1900 Other Certificated Salaries	160,528	164,541	167,832
TTL Certificated Salaries	**9,220,330**	**9,450,838**	**9,639,855**
2000 - Non - Certificated Salaries			
2100 Instructional Aides	152,528	156,341	159,468
2300 Classified Administrators	550,692	564,459	575,748
2400 Clerical & Technical Staff	717,773	735,717	750,432
TTL Non - Certificated Salaries	**1,420,993**	**1,456,518**	**1,485,648**
3000 - Employee Benefits			
3101 STRS Certificated	1,761,082	1,805,109	1,841,211
3300 OASDI/Medicare	246,618	252,783	257,839
3400 Health and Wellfare	1,372,801	1,407,121	1,435,263
3500 Unemployment Insurance	14,769	15,138	15,441
3600 Workers' Comp Certificated	65,408	67,043	68,384
3901 Other Benefits	167,502	171,690	175,123
TTL Employee Benefits	**3,628,180**	**3,718,885**	**3,793,262**
4000 - Books/Supplies/Materials			
4100 Textbooks & Core Curriculum	1,496,640	1,534,056	1,564,737
4300 Materials & Supplies	323,675	331,767	338,402
4310 Instructional Materials	1,385,697	1,420,339	1,448,746
4320 Office Supplies	12,500	12,813	13,069
4330 Meals & Events	20,100	20,603	21,015
4350 Other Supplies - Materials & Supplies	6,385	6,545	6,676
4400 Non - Capitalized Equipment - Staff	32,700	33,518	34,188
TTL Books/Supplies/Materials	**3,277,697**	**3,359,639**	**3,426,832**

5000 - Services & Operations			
5100 Subagreements For Services	200,000	205,000	209,100
5200 Travel & Conferences	166,132	170,285	173,691
5300 Dues & Memberships	18,000	18,450	18,819
5400 Insurance	118,608	121,573	124,005
5610 Facility Rents & Leases	154,168	158,022	161,183
5800 Professional Services - Non - instructional	163,108	167,186	170,529
5810 Legal	300,000	307,500	313,650
5820 Audit & CPA	30,668	31,435	32,063
5830 Non-Instructional Software Licenses/Fees	138,200	141,655	144,488
5840 Advertising & Recruitment	69,919	71,667	73,100
5841 Community Marketing	39,180	40,160	40,963
5850 Oversight Fees	380,121	389,624	397,417
5870 Live Scan Finger printing	400	410	418
5878 Testing & Assessments	48,563	49,777	50,773
5880 Instructional Vendors & Consultants	2,462,295	2,523,852	2,574,329
5890 Misc Other Outside Services	8,508	8,721	8,895
5930 Postage	13,400	13,735	14,010
5940 Technology Services	150,725	154,493	157,583
TTL Services & Operations	**4,461,995**	**4,573,545**	**4,665,016**
7438 Interest on Debt	0	0	0
TTL EXPENDITURES	**22,009,195**	**22,559,425**	**23,010,614**
Description	**Adopted Budget FY2023-24 Combined**	**Adopted Budget FY2023-24 Combined**	**Adopted Budget FY2023-24 Combined**
REVENUES LESS EXPENDITURES	**490,393**	**249,497**	**24,863**
BEGINNING BALANCE	**4,947,201**	**5,437,594**	**5,687,091**
ENDING BALANCE	**5,437,594**	**5,687,091**	**5,711,954**
ENDING BALANCE AS % OF EXPENDITURES	**24.71%**	**25.21%**	**24.82%**

Description	Helendale Adopted Budget FY2023-24	FY2023-24 Helendale Restricted	FY2023-24 Helendale Unrestricted
Enrollment - Projected	**561**		
Average Daily Attendance (P-2 Projected)	**550**		
COLA	**8.22%**		
REVENUES:			
General Purpose Entitlement			
8011 General Purpose Block Grant	6,393,611	0	6,393,611
8012 Education Protection Account	110,274	0	110,274
8096 Funding in Lieu of Property Taxes	107,674	0	107,674
TTL General Purpose Entitlement	**6,611,559**	**0**	**6,611,559**
Federal Revenue			
8181 Federal IDEA SpEd Revenue	107,375	107,375	0
8290 Other Federal Revenue	86,472	86,472	0
TTL Federal Revenue	**193,847**	**193,847**	**0**
Other State Revenue			
8311 AB602 State SpEd Revenue	338,150	338,150	0
8550 Mandated Cost Reimbursements	14,187	0	14,187
8560 State Lottery Revenue	130,587	36,917	93,670
8590 Other State Revenue	457,745	457,745	0
TTL Other State Revenue	**940,669**	**832,812**	**107,857**
Other Local Revenue			
8660 Interest Income	10,200	0	10,200
8980 Contributions to Restricted Programs	0	305,827	-305,827
TTL Other Local Revenue	**10,200**	**305,827**	**-295,627**
TTL REVENUES	**7,756,275**	**1,332,486**	**6,423,789**

EXPENDITURES:			
1000 - Certificated Salaries			
1100 Teacher Compensation	2,262,398	319,754	1,942,644
1200 Student Support	282,750	114,914	167,836
1300 Certificated Administrators	543,009	167,560	375,449
1900 Other Certificated Salaries	54,580	0	54,580
TTL Certificated Salaries	**3,142,737**	**602,228**	**2,540,509**
2000 - Non - Certificated Salaries			
2100 Instructional Aides	51,859	51,859	0
2300 Classified Administrators	187,235	0	187,235
2400 Clerical & Technical Staff	244,043	22,890	221,153
TTL Non - Certificated Salaries	**483,138**	**74,749**	**408,389**
3000 - Employee Benefits			
3101 STRS Certificated	600,262	248,984	351,278
3300 OASDI/Medicare	83,964	14,682	69,282
3400 Health and Wellfare	466,752	68,952	397,800
3500 Unemployment Insurance	5,118	1,627	3,491
3600 Workers' Comp Certificated	22,286	4,145	18,141
3901 Other Benefits	56,951	5,915	51,036
TTL Employee Benefits	**1,235,332**	**344,305**	**891,027**
4000 - Books/Supplies/Materials			
4100 Textbooks & Core Curriculum	507,388	69,209	438,179
4300 Materials & Supplies	114,596	99,599	14,997
4310 Instructional Materials	471,137	0	471,137
4320 Office Supplies	4,250	0	4,250
4330 Meals & Events	6,834	0	6,834
4350 Other Supplies - Materials & Supplies	2,171	0	2,171
4400 Non - Capitalized Equipment - Staff	10,918	10,000	918
TTL Books/Supplies/Materials	**1,117,294**	**178,808**	**938,486**

5000 - Services & Operations			
5100 Subagreements For Services	68,000	68,000	0
5200 Travel & Conferences	56,344	49,544	6,800
5300 Dues & Memberships	6,120	0	6,120
5400 Insurance	40,327	0	40,327
5610 Facility Rents & Leases	52,417	0	52,417
5800 Professional Services - Non - instructional	56,727	7,914	48,813
5810 Legal	102,000	0	102,000
5820 Audit & CPA	10,427	0	10,427
5830 Non-Instructional Software Licenses/Fees	46,988	0	46,988
5840 Advertising & Recruitment	23,772	0	23,772
5841 Community Marketing	13,321	0	13,321
5850 Oversight Fees	232,688	0	232,688
5870 Live Scan Finger printing	136	0	136
5878 Testing & Assessments	16,511	0	16,511
5880 Instructional Vendors & Consultants	837,180	0	837,180
5890 Misc Other Outside Services	2,893	0	2,893
5930 Postage	4,556	0	4,556
5940 Technology Services	51,247	6,938	44,309
TTL Services & Operations	**1,621,655**	**132,396**	**1,489,259**
7438 Interest on Debt	0	0	0
TTL EXPENDITURES	**7,600,156**	**1,332,486**	**6,267,670**

Description	Adopted Budget FY2023-24 Combined	FY2023-24 Helendale Restricted	FY2023-24 Helendale Unrestricted
REVENUES LESS EXPENDITURES	**156,119**	**0**	**156,119**
BEGINNING BALANCE	**2,262,331**	**0**	**2,262,331**
ENDING BALANCE	**2,418,450**	**0**	**2,418,450**
ENDING BALANCE AS % OF EXPENDITURES	**31.82%**	**0.00%**	**31.82%**

Description	Warner Adopted Budget FY2023-24	FY2023-24 Warner Restricted	FY2023-24 Warner Unrestricted
Enrollment - Projected	**1,089**		
Average Daily Attendance (P-2 Projected)	**1,067**		
COLA	**8.22%**		
REVENUES:			
General Purpose Entitlement			
8011 General Purpose Block Grant	11,489,882	0	11,489,882
8012 Education Protection Account	213,112	0	213,112
8096 Funding in Lieu of Property Taxes	816,699	0	816,699
TTL General Purpose Entitlement	**12,519,693**	**0**	**12,519,693**
Federal Revenue			
8181 Federal IDEA SpEd Revenue	176,164	176,164	0
8290 Other Federal Revenue	167,122	167,122	0
TTL Federal Revenue	**343,286**	**343,286**	**0**
Other State Revenue			
8311 AB602 State SpEd Revenue	888,170	888,170	0
8550 Mandated Cost Reimbursements	27,518	0	27,518
8560 State Lottery Revenue	252,642	71,422	181,220
8590 Other State Revenue	692,205	692,205	0
TTL Other State Revenue	**1,860,535**	**1,651,797**	**208,738**
Other Local Revenue			
8660 Interest Income	19,800	0	19,800
8980 Contributions to Restricted Programs	0	564,428	-564,428
TTL Other Local Revenue	**19,800**	**564,428**	**-544,628**
TTL REVENUES	**14,743,314**	**2,559,511**	**12,183,803**

EXPENDITURES:			
1000 - Certificated Salaries			
1100 Teacher Compensation	4,368,700	597,685	3,771,015
1200 Student Support	548,868	223,069	325,799
1300 Certificated Administrators	1,054,077	325,264	728,813
1900 Other Certificated Salaries	105,948		105,948
TTL Certificated Salaries	**6,077,593**	**1,146,018**	**4,931,575**
2000 - Non - Certificated Salaries			
2100 Instructional Aides	100,669	100,669	0
2300 Classified Administrators	363,457	0	363,457
2400 Clerical & Technical Staff	473,730	44,432	429,298
TTL Non - Certificated Salaries	**937,855**	**145,101**	**792,754**
3000 - Employee Benefits			
3101 STRS Certificated	1,160,820	491,796	669,024
3300 OASDI/Medicare	162,654	28,166	134,488
3400 Health and Wellfare	906,049	133,849	772,200
3500 Unemployment Insurance	9,651	2,875	6,776
3600 Workers' Comp Certificated	43,122	7,908	35,214
3901 Other Benefits	110,551	11,481	99,070
TTL Employee Benefits	**2,392,848**	**676,075**	**1,716,773**
4000 - Books/Supplies/Materials			
4100 Textbooks & Core Curriculum	989,252	138,668	850,584
4300 Materials & Supplies	209,079	179,968	29,111
4310 Instructional Materials	914,560	0	914,560
4320 Office Supplies	8,250	0	8,250
4330 Meals & Events	13,266	0	13,266
4350 Other Supplies - Materials & Supplies	4,214	0	4,214
4400 Non - Capitalized Equipment - Staff	21,782	20,000	1,782
TTL Books/Supplies/Materials	**2,160,403**	**338,636**	**1,821,767**

5000 - Services & Operations			
5100 Subagreements For Services	132,000	132,000	0
5200 Travel & Conferences	109,788	96,588	13,200
5300 Dues & Memberships	11,880	0	11,880
5400 Insurance	78,281	0	78,281
5610 Facility Rents & Leases	101,751	0	101,751
5800 Professional Services - Non - instructional	106,381	11,626	94,755
5810 Legal	198,000	0	198,000
5820 Audit & CPA	20,241	0	20,241
5830 Non-Instructional Software Licenses/Fees	91,212	0	91,212
5840 Advertising & Recruitment	46,147	0	46,147
5841 Community Marketing	25,859	0	25,859
5850 Oversight Fees	147,433	0	147,433
5870 Live Scan Finger printing	264	0	264
5878 Testing & Assessments	32,052	0	32,052
5880 Instructional Vendors & Consultants	1,625,115	0	1,625,115
5890 Misc Other Outside Services	5,615	0	5,615
5930 Postage	8,844	0	8,844
5940 Technology Services	99,478	13,467	86,011
TTL Services & Operations	**2,840,340**	**253,681**	**2,586,659**
7438 Interest on Debt	0	0	0
TTL EXPENDITURES	**14,409,040**	**2,559,511**	**11,849,529**

Description	Adopted Budget FY2023-24 Combined	FY2023-24 Warner Restricted	FY2023-24 Warner Unrestricted
REVENUES LESS EXPENDITURES	**334,274**	**0**	**334,274**
BEGINNING BALANCE	**2,684,870**	**0**	**2,684,870**
ENDING BALANCE	**3,019,144**	**0**	**3,019,144**
ENDING BALANCE AS % OF EXPENDITURES	**20.95%**	**0.00%**	**20.95%**

Excel Academy Charter School- Helendale estimated 2023-24 EPA entitlement is $110,274. Staff proposes to code 100% of the EPA resource to certificated teaching staff salaries.

Group		Percentage of GF Cost per group		The percentage applied to EPA funds		Amount
Certificated Staff		100%		100%		$110,274
Total:		**100%**		**100%**		**$110,274**

Proposed Expenditures by Function - Detail

Certificated Positions			
Position	**Number of Employees**	**SACS Function/Object**	**Cost**
Classroom Teacher Salaries	1.25	1000/1100	$110,274
Totals	**1.25**	**1000/1100**	**$110,274**

The following summary shows the fiscal year 2024, 2025, and 2026 revenue and expenditure calculations:

Excel Academy Charter School - Helendale	
Education Protection Account Spending Summary	
2023-24 Fiscal Year:	
Final Education Protection Account (EPA) Revenues:	$110,274
EPA Expenditures on Teacher Salaries & Benefits:	**$110,274**
Unspent 2023-24 EPA Revenues:	-
2024-25 Fiscal Year:	
Projected Education Protection Account (EPA) Revenues:	$111,377
EPA Expenditures on Teacher Salaries & Benefits:	**$111,377**
Unspent 2024-25 EPA Revenues:	-
2025-26 Fiscal Year:	
Projected Education Protection Account (EPA) Revenues:	$112,490
EPA Expenditures on Teacher Salaries & Benefits:	**$112,490**
Unspent 2025-26 EPA Revenues:	-
EPA Requirements Met in Each Year?	**YES**

Excel Academy Charter School- Warner estimated 2023-24 EPA entitlement is $213,112. Staff proposes to code 100% of the EPA resource to certificated teaching staff salaries.

Group		Percentage of GF Cost per group		The percentage applied to EPA funds		Amount
Certificated Staff		100%		100%		$213,112
Total:		**100%**		**100%**		**$213,112**

Proposed Expenditures by Function - Detail

Certificated Positions			
Position	**Number of Employees**	**SACS Function/Object**	**Cost**
Classroom Teacher Salaries	2.41	1000/1100	$213,112
Totals	**2.41**	**1000/1100**	**$213,112**

The following summary shows the fiscal year 2024, 2025, and 2026 revenue and expenditure calculations:

Excel Academy Charter School - Warner	
Education Protection Account Spending Summary	
2023-24 Fiscal Year:	
Final Education Protection Account (EPA) Revenues:	$213,112
EPA Expenditures on Teacher Salaries & Benefits:	**$213,112**
Unspent 2023-24 EPA Revenues:	-
2024-25 Fiscal Year:	
Projected Education Protection Account (EPA) Revenues:	$215,243
EPA Expenditures on Teacher Salaries & Benefits:	**$215,243**
Unspent 2024-25 EPA Revenues:	-
2025-26 Fiscal Year:	
Projected Education Protection Account (EPA) Revenues:	$217,396
EPA Expenditures on Teacher Salaries & Benefits:	**$217,396**
Unspent 2025-26 EPA Revenues:	-
EPA Requirements Met in Each Year?	**YES**

ACTION: Warner - Approval of 2023-2024 EPA Plan

BACKGROUND:

Proposition 30, The Schools and Local Public Safety Protection Account of 2012, approved by the voters on November 6, 2012, temporarily increases the state's sales tax rate for all taxpayers and the personal income tax rates for upper-income taxpayers.

Proposition 30 provides that all K-14 local agencies have the sole authority to determine how the funds received from the EPA are spent, but with these provisions:

- The spending plan must be approved by the governing board during a public meeting.
- EPA funds cannot be used for the salaries or benefits of administrators or any other administrative costs. (See the list of functions on the CDE website referenced below for which EPA funds may be used.)
- Each year, the local agency must publish on its website an accounting of how much money was received from the EPA and how the funds were expended.

The revenues generated from Proposition 30 are deposited into a state account called the Education Protection Account (EPA). School districts, county offices of education, and charter schools (LEAs) will receive funds from the EPA based on their proportionate share of the statewide revenue limit amount. A corresponding reduction is made to an LEA's revenue limit EPA entitlement. LEAs received EPA payments quarterly beginning with the 2013-14 Fiscal Year.

In November 2016, Proposition 55 Tax extension amended Proposition 30, providing continued allocation. Of the revenues generated from Section 36 of Article XIII EPA funds, 89 percent is provided to K-12 Education and 11 percent to community colleges.

It is proposed that EPA funds be used to cover salary and benefit costs of non-administrative certificated staff. Their share of costs determines the percentage of funds used per group to the general fund. Salaries below are calculated assuming no furlough days and/or salary rollbacks. Any difference in revenue and/or expenditures will be adjusted in teacher salaries (function 1000; object 1100).

For frequently asked questions about EPA, please refer to the California Department of Education's website at: http://www.cde.ca.gov/fg/aa/pa/pafaq.asp.

CURRENT CONSIDERATIONS:

Excel Academy Charter School estimated 2023-24 EPA entitlement is $213,112 Warner.

Staff has coded 100% of the EPA resource to certificated teaching staff salaries.

Group		Percentage of GF Cost per group		Percentage applied to EPA funds		Amount
Certificated Staff		100%		100%		$213,112
Total:		**100%**		**100%**		**$213,112**

Expenditures by Function - Detail

Certificated Positions			
Position	**Number of Employees**	**SACS Function/Object**	**Cost**
Classroom Teacher Salaries	2.41	1000/1100	$213,112
Totals	**2.41**	**1000/1100**	**$213,112**

EPA Requirements Met?	**YES**

RECOMMENDATION:

Staff requests that the Board approve the 2023-24 Education Protection Account (EPA) plan.

FINANCIAL IMPACT:

Proposition 30 and Proposition 55 fund, Education Protection Account, increases the Charter's revenues to provide more credentialed teaching resources for students, and has a positive impact on the charter's revenue stream.

ACTION: Helendale - Approval of 2023-2024 EPA Plan

BACKGROUND:

Proposition 30, The Schools and Local Public Safety Protection Account of 2012, approved by the voters on November 6, 2012, temporarily increases the state's sales tax rate for all taxpayers and the personal income tax rates for upper-income taxpayers.

Proposition 30 provides that all K-14 local agencies have the sole authority to determine how the funds received from the EPA are spent, but with these provisions:

- The spending plan must be approved by the governing board during a public meeting.
- EPA funds cannot be used for the salaries or benefits of administrators or any other administrative costs. (See the list of functions on the CDE website referenced below for which EPA funds may be used.)
- Each year, the local agency must publish on its website an accounting of how much money was received from the EPA and how the funds were expended.

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For frequently asked questions about EPA, please refer to the California Department of Education's website at: http://www.cde.ca.gov/fg/aa/pa/pafaq.asp.

CURRENT CONSIDERATIONS:

Excel Academy Charter School estimated 2023-24 EPA entitlement is $110,274 Helendale.

Staff has coded 100% of the EPA resource to certificated teaching staff salaries.

Group		Percentage of GF Cost per group		Percentage applied to EPA funds		Amount
Certificated Staff		100%		100%		$110,274
Total:		**100%**		**100%**		**$110,274**

Expenditures by Function - Detail

Certificated Positions			
Position	**Number of Employees**	**SACS Function/Object**	**Cost**
Classroom Teacher Salaries	1.25	1000/1100	$110,274
Totals	**1.25**	**1000/1100**	**$110,274**

EPA Requirements Met?	**YES**

RECOMMENDATION:

Staff requests that the Board approve the 2023-24 Education Protection Account (EPA) plan.

FINANCIAL IMPACT:

Proposition 30 and Proposition 55 fund, Education Protection Account, increases the Charter's revenues to provide more credentialed teaching resources for students, and has a positive impact on the charter's revenue stream.

Excel Academy Charter School FY2023-24 Proposed Budget

June 15, 2023

Presentation Overview

- Budget Assumptions
- Local Control Funding Formula (LCFF)
- New Programs for FY2023-24
- Multi-Year Projection
- Next Steps

Budget Assumptions

Revenues:

- COLA – Increase
  - FY2023-24 – 8.22%
  - FY2024-25 – 0.00%
  - FY2025-26 – 0.00%
- Enrollment Increase Projection – 1.0%
- Attendance Rate (ADA) – 98%
- Unduplicated Pupil Percentages 47.75% for Helendale and 37.30% for Warner

Expenditures:

- Step and Column Increase – 3.%
- Zero Budgeted for Interest Expenses on Loans

2023-24 LCFF Funding Factors

$1,692,678

Grade Span	TK	K-3	4-6	7-8	9-12
2022-23 Base Grant per ADA	$9,166	$9,166	$9,304	$9,580	$11,102
8.22% COLA	$753	$753	$765	$787	$913
2023-24 Base Grant per ADA	$9,919	$9,919	$10,069	$10,367	$12,015
GSA	$1,032	$1,032	–	–	$312
TK Add-on (inclusive of COLA)	$3,044	–	–	–	–
2023-24 Adjusted Base Grant per ADA	$13,995	$10,951	$10,069	$10,367	$12,327
20% Supplemental Grant per ADA[1]	–	$2,190	$2,014	$2,073	$2,465
65% Concentration Grant per ADA[2]	–	$7,118	$6,545	$6,739	$8,013

[1]Maximum amount per ADA—to arrive at LEA's grant amount, multiply adjusted base grant per ADA by 20% and UPP
[2]Maximum amount per ADA—to arrive at LEA's grant amount, multiply adjusted base grant per ADA by 65% and UPP above 55%

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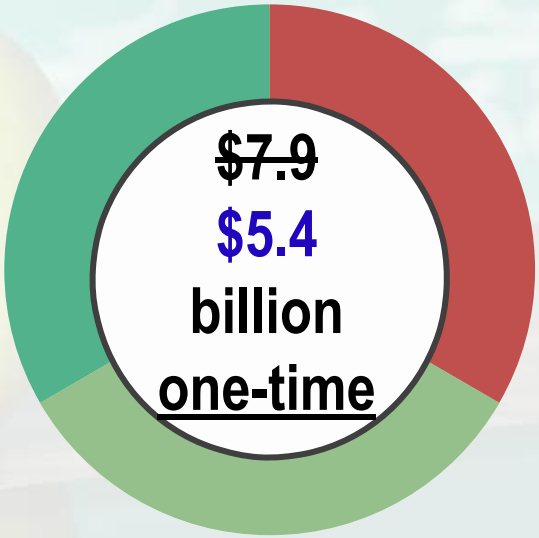
Learning Recovery Emergency Block Grant

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

Distribution

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



Reporting

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

Deadline

Funds may be used through 2027-28 school year

EACS Allocation
$1,575,640 ???

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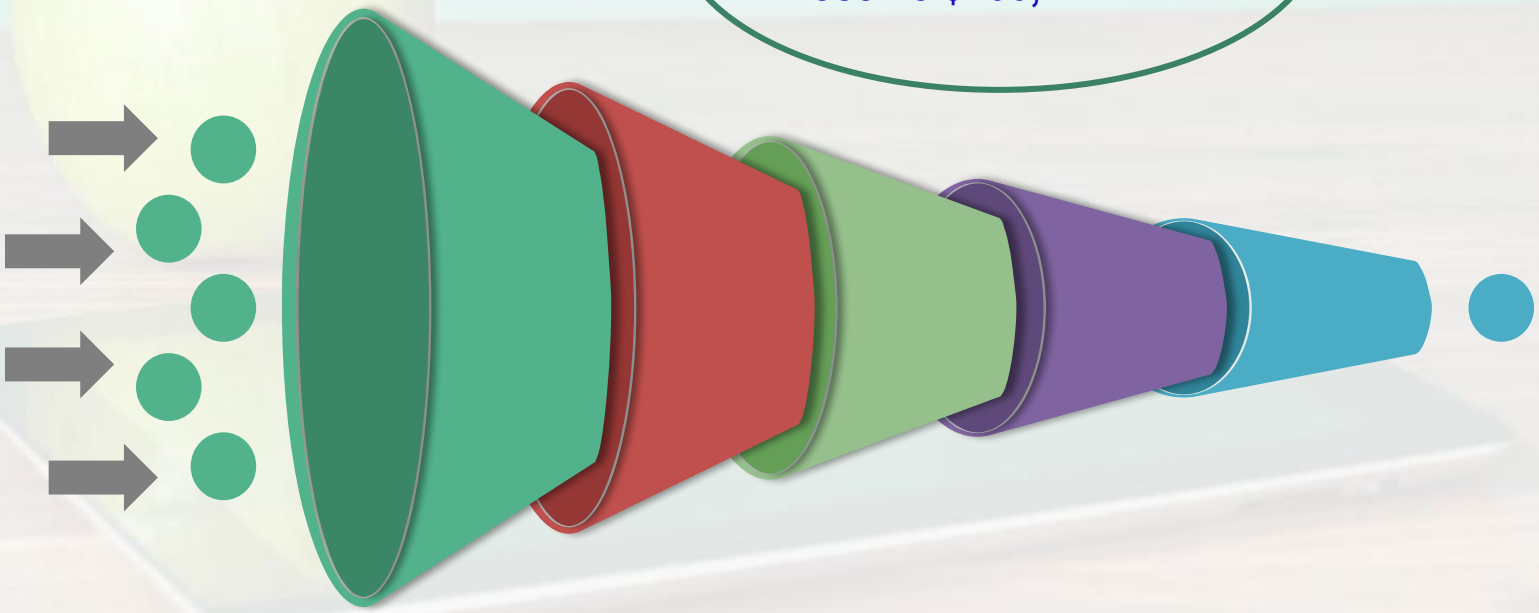
Proposition 28: Arts and Music in Schools–Funding Guarantee and Accountability Act

Beginning with the 2023-24 fiscal year, requires the state to provide additional, dedicated funding originating outside of Proposition 98 for arts and music education

Estimated to increase state costs by nearly $1 billion in 2023-24

Excel Academy Charter School is estimated to receive $266,127 ???

The annual amount is equal to 1% of the prior-year Proposition 98 minimum guarantee.



Arts, Music, and Instructional Materials Discretionary Block Grant

$1.72 billion one-time

~~**$3.6 billion one-time**~~

Distribution

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

Plan

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

Deadline

Encumber through the 2025-26 school year

EACS Allocation

~~**$1,220,598**~~

$583,175

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Combined Multi-Year Projections (FY2023-24 Proposed Budget)

	2023-24	2024-25	2025-26
Total Revenues	22,499,588	22,808,922	23,035,477
Total Expenditures	22,009,195	22,559,425	23,010,614
Projected Increase in Fund Balance	490,393	249,497	24,863
Projected Beginning Balance	4,947,201	5,437,594	5,687,091
Projected Ending Balance	5,437,594	5,687,091	5,711,954
Adjustments to Ending Fund Balance			
Restricted Carryover Balances			
15% Required for Economic Uncertainties	3,301,379	3,383,914	3,451,592
Unappropriated Fund Balance Above 15%	2,136,215	2,303,177	2,260,362
Ending Balance Percent Of Expenditures	24.71%	25.21%	24.82%

Next Steps

- **EACS**
  - FY 2023-24 Budget and LCAP Adoption – June 22, 2023
  - FY 2022-23 Unaudited Actuals – September 15, 2023
  - FY 2023-24 First Interim Budget – December 15, 2023
- **State Level**
  - FY 2023-24 State Budget Adoption

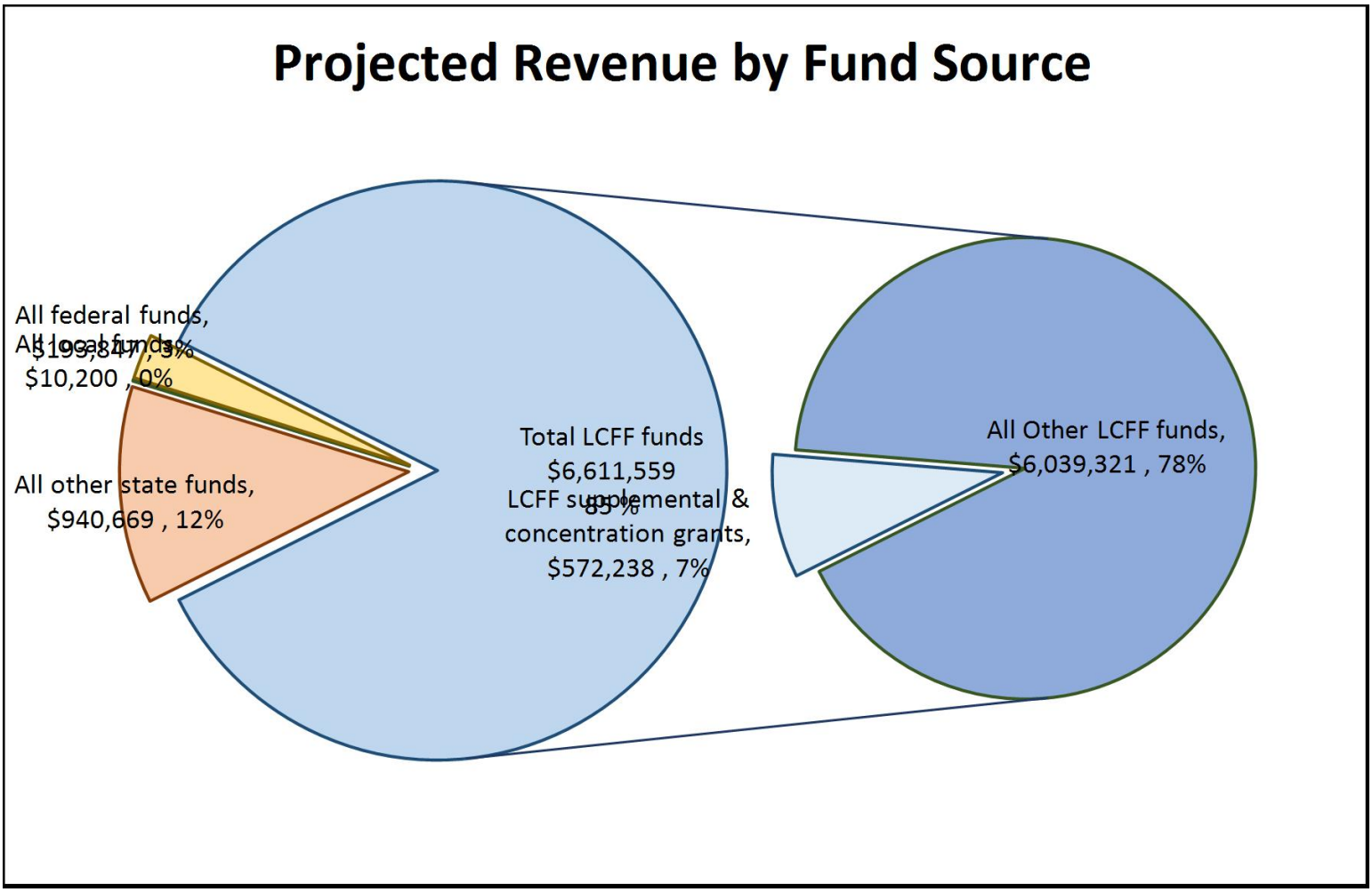
LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Excel Academy Charter School - Helendale
CDS Code: California
School Year: 2023-24
LEA contact information:
Heidi Gasca
Executive Director

(949) 412-3122

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

Budget Overview for the 2023-24 School Year

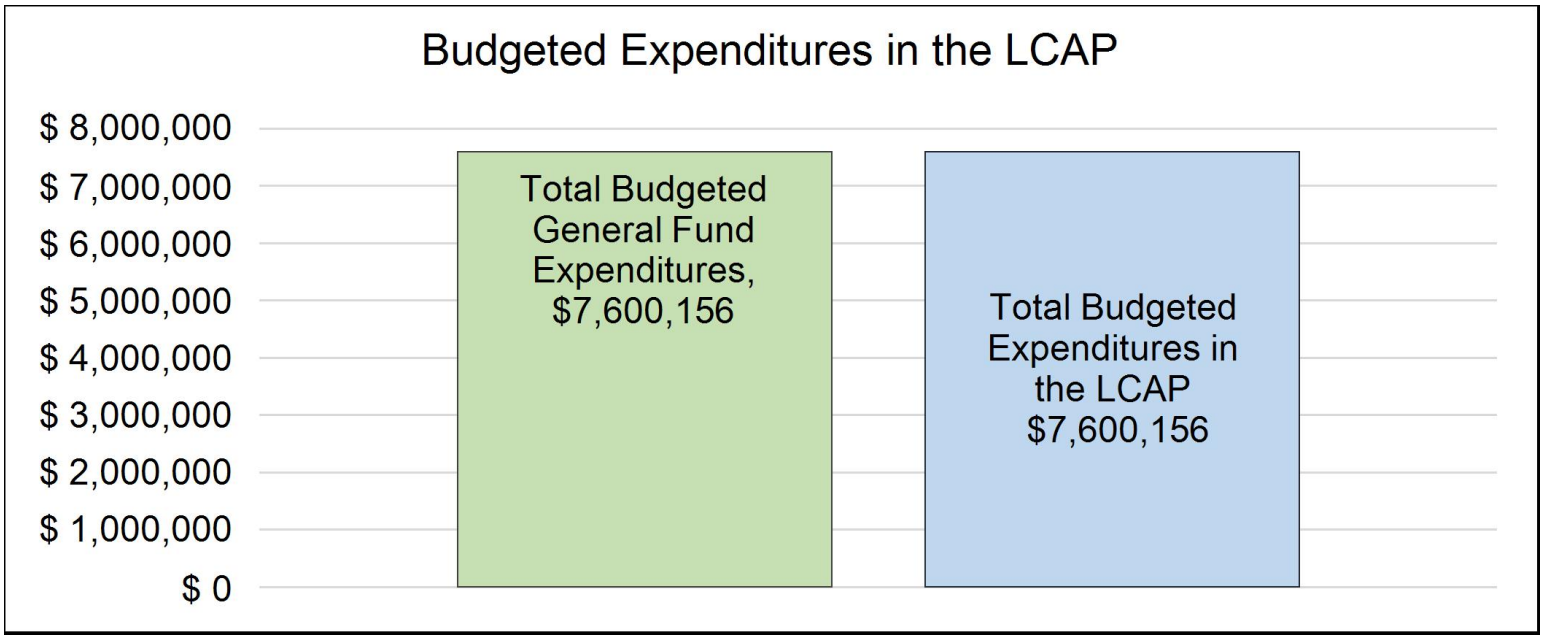


This chart shows the total general purpose revenue Excel Academy Charter School - Helendale expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Excel Academy Charter School - Helendale is $7,756,275, of which $6,611,559 is Local Control Funding Formula (LCFF), $940,669 is other state funds, $10,200 is local funds, and $193,847 is federal funds. Of the $6,611,559 in LCFF Funds, $572,238 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Excel Academy Charter School - Helendale plans to spend for 2023-24. It shows how much of the total is tied to planned actions and services in the LCAP.

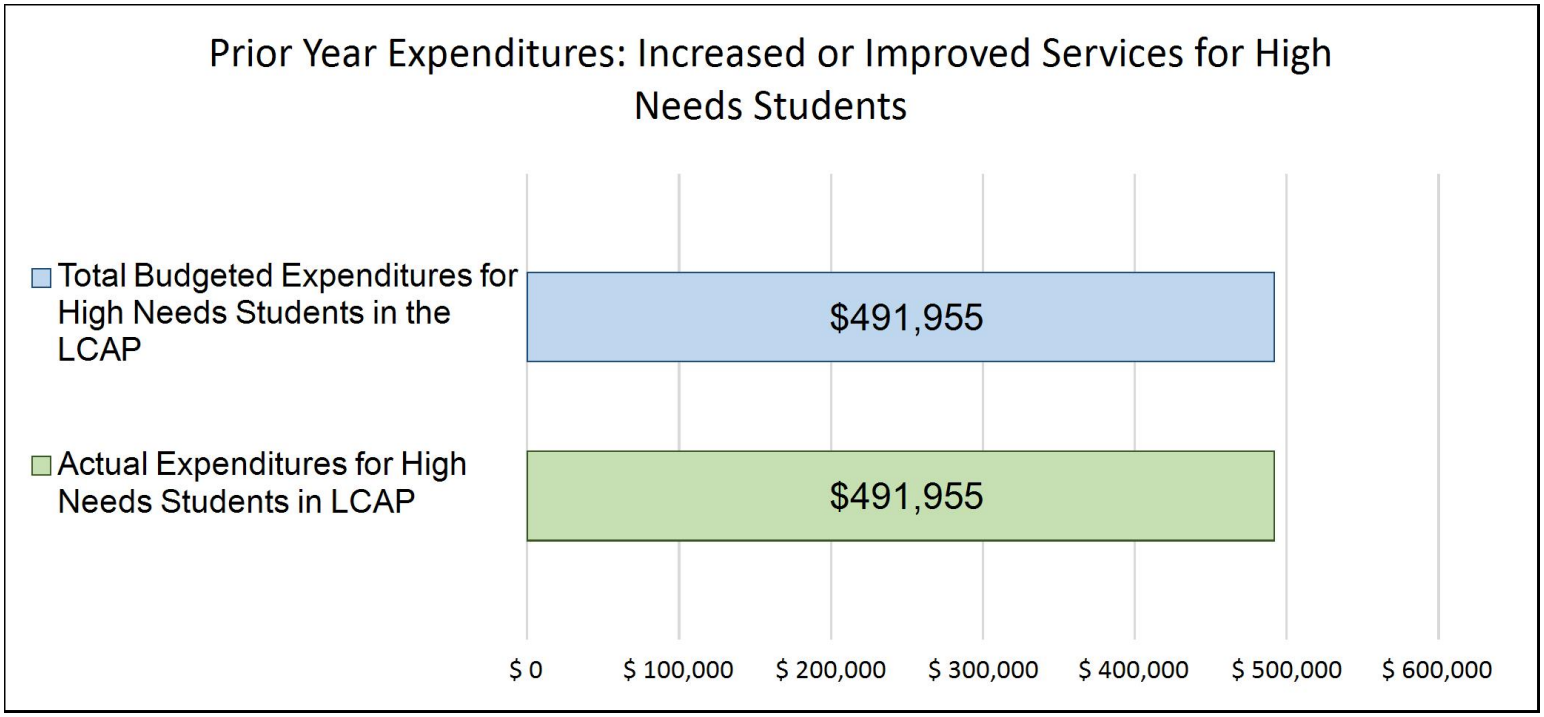
The text description of the above chart is as follows: Excel Academy Charter School - Helendale plans to spend $7,600,156 for the 2023-24 school year. Of that amount, $7,600,156 is tied to actions/services in the LCAP and $0 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Excel Academy Charter School - Helendale is projecting it will receive $572,238 based on the enrollment of foster youth, English learner, and low-income students. Excel Academy Charter School - Helendale must describe how it intends to increase or improve services for high needs students in the LCAP. Excel Academy Charter School - Helendale plans to spend $572,238 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2022-23



This chart compares what Excel Academy Charter School - Helendale budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Excel Academy Charter School - Helendale estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2022-23, Excel Academy Charter School - Helendale's LCAP budgeted $491,955 for planned actions to increase or improve services for high needs students. Excel Academy Charter School - Helendale actually spent $491,955 for actions to increase or improve services for high needs students in 2022-23.

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Helendale	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

Plan Summary [2023-24]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Excel Academy Charter School is an non-classroom based California charter school offering a tuition-free personalized learning independent study model for students in grades TK-12 . Our high-quality, educational program is rooted in flexible learning, personalized schedules, and proven systems of support where credentialed teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student. Excel Academy is accredited by the Western Association of Schools and Colleges (WASC) which is a statement to the community and educational partners that the institution is reputable, student oriented, focused on quality education and student performance, and is committed to ongoing improvement. Excel Academy offers students various options for state-approved curriculum as well as academic and elective services using instructional funds provided by the charter school. With the support and guidance of a highly-qualified credentialed teacher, students build a customized learning plan based on individual educational goals. Teachers, students, and parents consistently collaborate to properly pace and design an instructional schedule to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. Excel Academy operates on a traditional school calendar with regularly scheduled holidays. Daily and weekly communication occurs between teachers, parents, and students to ensure academic progress as well as support for social and emotional success. In addition, families meet in person at least once every 20 school days to review assigned work, discuss student learning, celebrate successes, and set goals for the upcoming learning period (LP). Excel Academy believes in fostering strong educational partnerships between the school, parents, students, and stakeholders through continued communication, collaboration, and transparency.

Students enrolled in this school reside in urban, suburban, and rural areas throughout San Bernardino, Los Angeles, Kern, and Inyo counties. Excel Academy serves a diverse community of students and parents due to the nature of independent study. On CBEDS day 2022-23, Excel Academy Charter School- Helendale reported an enrollment of 545 students. This includes the enrollment of 49.9% socio-economically disadvantaged, 3.1% English Learners, 9.7% Special Education, .5% Homeless, and .1% Foster Youth. 47.3% of students enrolled in Excel Academy Charter School- Helendale are Hispanic.

Mission Statement:

Excel Academy will provide a flexible, personalized learning experience where teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student.

Our Vision
Life is what you create….at Excel Academy we bring students to LIFE through:

LEARNING: At Excel Academy students progress in knowledge, ability and social/emotional foundations. Curriculum and staff will provide a personalized learning plan inherent to the uniqueness of every student and learning situation. Excel Academy pursues a learning environment where every student will be challenged by, enjoy, and help direct their own education.

INDEPENDENCE: Excel Academy believes one of the key elements of an optimal education is to prepare each student for real-life complexities and independent learning. Excel Academy's curriculum options not only align to California's academic content standards but offer alternative and supplemental learning resources that place the student in a climate where curiosity and exploration are rewarded.

FLEXIBILITY: Flexible pacing enables each Excel Academy student, under the guidance of the teacher of record, to target individual needs without the demands of a classroom. By developing an awareness of their own unique learning style and advancement in their communication abilities, students and families will be enabled to discover their greatest areas of need and direct their efforts accordingly.

EMPOWERMENT: Excel Academy strives to empower students to take ownership of their education and develop not only the appropriate knowledge, skills, and abilities, but also the confidence, creativity, and discipline to help them adapt to challenges and opportunities.

Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Excel Academy Charter School is most proud of the following:

1) This year, the California Distinguished Schools program recognized Excel Academy for their excellent work in closing the achievement gap and achieving exceptional student performance.

2) The dedication of the EACS staff has proven to ensure consistent and valued communication between all educational partners. The number one priority is the success of the students academically, socially, and emotionally. With systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the recent LCAP survey results, parents and students agree that Excel Academy is dedicated to providing an education that denotes excellence.

Parent/Guardian survey results:
93.8% of survey respondents "agree" that the overall school organization lends itself to efficiency and student achievement.
98.4% of the survey respondents “agree” that EACS provides students access to rigorous core content curriculum and resources for students to access and master grade level standards.
97% of the survey respondents “agree” that EACS and teachers clearly communicate academic expectations and encourage academic excellence.
97.4% of survey respondents “agree” that their child’s school has developed a partnership with them to support their child’s academic learning and achievement.

Student survey results:
100% of student survey respondents "agree" their Teacher of Record (ToR) is available to speak with them when they need guidance.
99.9% of student survey respondents "agree" that the ToR cares about their education and is committed to helping them succeed.
96.9% of student survey respondents "agree" the curriculum provides challenging grade level instruction and assessment of their academic progress.

3) Excel Academy offered a plethora of opportunities to build student engagement and peer connections through monthly Outdoor Classroom days where students collaborated on hands-on experiments tied to content standards, virtual learning lessons across all core subjects, and field trips throughout Southern California. In addition, Social Emotional Learning Lessons for students in grades K-12 were led by credentialed teachers and allowed students to connect with peers to learn important life skills. Excel Academy piloted a mental wellness survey for students in grades 7-12, and provided Care Solace to better support mental health of the educational partners. In addition, the Gifted Learner Program was launched and successfully well received. EACS students flourished as participants in the theater, Coder-Z, e-Sports, and Student Council programs.

4) Excel Academy's local assessment, i-Ready diagnostic benchmark assessments, were administered to measure student progress in the fall, winter, and spring during the 2022-2023 school year. Based on an analysis of our i-Ready fall and spring scores in ELA and Math, our

school demonstrated success in decreasing the percentages of students in tiers 2 & 3 (one or more grade levels below the current grade level). 76.3% of our students are at or above grade level in ELA. Tier 1 (students at or above grade level) grew by 12% since the first diagnostic in September. 68.8% of our students are at or above grade level in math. Tier 1 (students at or above grade level) grew by 20% since the first diagnostic in September. Excel Academy attributes the progress and success to the consistent support and guidance of our credentialed teachers, communication between teachers, students, and parents, the consistent completion of the i-Ready personalized lessons, and the interventions in place to provide specific
resources, supplements, and live instruction to close learning gaps and strengthen skills.

5) Our students in the "What I Need" WIN intervention program showed tremendous growth in six months after retaking the i-Ready assessments. In ELA, 49% of students showed 1+ years growth, and 53% in math. Progress has been made to implement additional classes to serve students who need focus on early reading and foundational math support during the 2023-24 school year.

6) English Learners were provided with grade level appropriate weekly live instruction in reading, writing, listening, and speaking to build English language fluency. The students enjoyed the sessions and we are looking forward to seeing the progress they have made on the Summative ELPAC score reports.

7) Excel Academy's 100% graduation rate, 0% suspension and expulsion rates, and a low chronic absenteeism rate of 1.1% is a success we are very proud of!

8) In addition to continuing to increase the school’s A-G course offerings, Excel Academy continued to focus on increasing access to A-G courses with an emphasis on our 9th and 10th grade students. With great success, all core A-G required coursework is accessible for A-G completion. We introduced additional support for struggling students to meet Algebra 1 requirements and all students are are on track to complete the next math sequence.

We will maintain or build on our educational partner engagement success by:

1) Excel Academy will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and providing resources, support, and opportunities for all students to continue to grow as lifelong learners. Excel Academy will survey educational partners for feedback, and analyze the areas that we can maintain and improve upon.

2) Excel Academy will continue to offer opportunities for students to build rapport with peers while learning to enhance their social emotional well being through lessons and conversations.

3) Excel Academy will continue to assess students using i-Ready diagnostic benchmark assessments and encourage completion of personalized lessons to help strengthen skills and close learning gaps. In addition, Excel Academy will continue to provide grade level test prep packets, virtual test prep sessions, and practice tests to help prepare students for state testing. At Excel Academy, our goal is to strive for 100% participation in all areas of assessment.

4) Our English Learners will continue to be provided with the required English Language Development (ELD) curriculum and mandatory live instruction to help build English fluency in reading, writing, listening, and speaking.

5) Excel Academy will maintain and build on our high school graduation success by focusing on supporting students to achieve their goal of high school graduation through continual monitoring of student data to identify students who are struggling and provide interventions to assist students in overcoming barriers so they can be successful and stay on track to complete courses and graduate.

6) The High School Department is working to establish a more transparent A-G tracking system through our school information system for 2023-24.

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

Excel Academy's administration will review the i-Ready and CAASPP data and create a plan to improve any areas that indicate low performance among student groups. In addition, Excel Academy's Intervention Department has provided the necessary resources and support, including live instruction, to students who recently scored in tier 2 and tier 3 on the spring i-Ready assessments. The team has also made it a priority to finalize the interventions and live instruction that will be in place for students who scored in tier 2 and tier 3 (one plus grade levels below the current grade levels) on i-Ready for the 23/24 school year. Our goal is to make sure that all students have the necessary interventions in place to progress and thrive in our model when school resumes.

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

Goal 1: Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. With a focus on supporting our students to achieve, the goal, along with the actions and services, focuses on monitoring each student's academic achievement. It is our top priority to continually monitor student data to identify struggling students and provide targeted interventions knowing this plays an integral role in preventing learning gaps and fostering student success. i-Ready, CAASPP, ELPAC, and end of course assessments are all metrics we monitor to ensure students are on track for graduation.

Goal 2: Excel Academy will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students maintain active engagement to learn and improve their performance. We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal, as well as the actions and services, focuses on student, family, and teacher engagement and connectedness in an effort to attain a high average daily attendance and ongoing student engagement in learning.

Goal 3: Excel Academy will establish connections and partnerships with our families and the school community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement. Effective, meaningful, and transparent communication provides all educational partners opportunities for input regarding policy and program improvement. Building strong connections with students and parents leads to increased student engagement and achievement. Increasing the number of Parent Input Survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and community partners.

Goal 4: Excel Academy will ensure that students are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all stakeholders will help ensure proper support is in place to prepare high school students for required internal and state assessments. The goal, as well as the actions and services, focuses on monitoring each student's progress toward graduation and ensuring preparedness for college and career. Continual monitoring of student data to identify struggling students and interventions is central to keeping students on-track with course completion and their 4-Year Plan towards graduation. Graduation Rate, College/Career Prepared, CTE participation, and CAASPP scores are all metrics we monitor to ensure students are on track to graduation and to achieve their post-graduation goals.

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable to Excel Academy Charter School – Helendale

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable to Excel Academy Charter School – Helendale

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable to Excel Academy Charter School – Helendale

Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Excel Academy Charter School is focused on providing effective and meaningful communication that will provide all educational partners opportunities for input in decision making that concerns the education of our students and the quality of our school program. Communication about opportunities to provide input is provided through social media platforms, including Beehively, as well as during SSC, ELAC, and PAC meetings. There were 304 participants in our LCAP Parent Input Survey with a 28% increase in survey respondents from the 2022/23 school year. 96.1% of survey respondents agree that EACS provides opportunities for parents to give input and participate in the school and child's education. Excel Academy shared the survey results with educational partners on 5/4/2023 and in our prior newsletters.

Meetings for the Annual Review of the LCAP Goals and actions/services to determine their effectiveness and any modifications that would need to be made in order to improve our school program:

Approach to engaging our Educational Partners:
The scheduling of LCAP input meetings were planned in collaboration with our educational partners.

Timeline of Process:
Staff: Staff and department meetings are held and the EACS team is engaged in the review of the school wide goals to provide input prior to the approval of the LCAP. LCAP surveys are provided to the entire staff and survey results are reviewed and shared.
Leadership Team: Monthly cabinet meetings were held.

Collaboration topics:
Excel Academy's mission and vision
Increase parent understanding for the need of student assessments and participation
Expand CTE classes
Focus on providing interventions and helping students set academic and personal goals
Professional development within all departments: general education (elementary and high school), assessment and special programs, interventions, and Special Education

ELAC: 9/7/2022, 11/2/2022, 2/1/2023, 5/3/2023
SSC: 9/13/2022, 11/3/2022, 2/2/2023, 5/4/2023
PAC: 11/1/2022, 5/1/2023
SELPA Approval: June 2023 submitted
School Board LCAP Draft Public Hearing: 6/15/2023
School Board LCAP Adoption Public Meeting: 6/22/2023

A summary of the feedback provided by specific educational partners.

Analysis of educational partner input (ideas, trends, or inputs):

The results of the Excel Academy Charter School (EACS) stakeholder input surveys provided our staff with an opportunity to identify trends in what stakeholders are saying about EACS and to collaborate on best practices to continue to support student success.

Educational Partner Input:
96.7% of survey respondents "agree" that EACS' vision and mission are clear and understandable.
93.8% of survey respondents "agree" that the overall school organization lends itself to efficiency and student achievement.
98.4% of the survey respondents “agree” that EACS provides students access to rigorous core content curriculum and resources for students to access and master grade level standards.
97% of the survey respondents “agree” that EACS and teachers clearly communicate academic expectations and encourage academic excellence.
93.4% of survey respondents “agree” that their student(s) set personal academic achievement goals.
93% of the survey respondents “agree” that the WIN (What I Need) intervention program provides the supplemental support that helps students improve in academic areas they may be struggling with.
92.4% of survey respondents "agree" that EACS uses assessment data to modify and monitor curriculum and instruction of students.
92.1% of survey respondents “agree” that they feel connected to the school, valued and respected.
97% of survey respondents “agree” that they feel safe and welcome to meet with their child’s teachers or school staff to discuss student progress.
97% of survey respondents “agree” that there is regular communication of their student’s progress.
97.4% of survey respondents “agree” that their child’s school has developed a partnership with them to support their child’s academic learning and achievement.
95.4% of survey respondents “agree” that the school demonstrates good effort in providing opportunities for involvement and input.
98% of high school parent survey respondents “agree” that the school provides support for high school students to be on the correct path to graduate from high school and become college and career ready.
97% of high school parent survey respondents “agree” that the school provides opportunities for high school students to participate in CTE courses or graduation pathways.
95.7% of survey respondents overall agree that the school supports students in their academic goals.
96.1% of survey respondents overall agree that the school provides opportunities for parents to give input and participate in student’s education.

In response to the survey input, the Director of Assessment and Accountability shared the survey results with educational partners to address trends in the input. The response to input was shared during the ELAC and SSC meetings in May, in addition with the staff in March and educational partners in the April and May newsletters. There was no input that directly affected the LCAP goals and actions besides helpful suggestions to help strengthen the programs that are offered. The most consistent trend we found was praise for our school and appreciation for all of the resources provided to families. Sample responses include:

Educational Partner Input Trends:
"I am so pleased and impressed with Excel. I appreciate the team of teachers and professionals that have made our transition from a brick and mortar school to a virtual school so seamless. Our Teacher of Record is extremely responsive and creative in her supports to our family. Thank you!"
"Excel Academy staff is excellent!"
"Please continue with this outstanding approach to education, it is greatly appreciated!"
"Our ToR has been so instrumental in my daughters successes. I couldn't be more grateful for her!"
"I really appreciate your Vision and Mission statements. They are in alignment with what our family believes what educational institutions should be aiming."
"I believe we have everything possible with Excel to achieve my children's success in learning and can't think of anything else we may need in order to reach our goals."

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

How the educational partner input influenced the development of the LCAP:
There was no input that directly affected the LCAP goals and actions.
The response to input was shared during the ELAC and SSC meetings in May, in addition with the staff in March and educational partners in the April and May newsletters.
Program Review: Prior to the finalization of the LCAP, stakeholders participated in a review of the LCAP draft during the ELAC and SSC meetings. The feedback consisted of clarifying questions about the program and overall support of our school and its programs.

Goals and Actions

Goal

Goal #	Description
1	Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.

An explanation of why the LEA has developed this goal.

Broad Goal:
With a focus on supporting student achievement, the goal and our actions/services focus on monitoring each student's academic achievement. Continual monitoring of student data to identify struggling students and interventions is important to the success of our students and helps prevent learning gaps. The metrics we utilize to ensure students are on track for graduation include i-Ready, CAASPP, and ELPAC.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in ELA CAASPP in 2020-21. A baseline will be developed from 2021-22 CAASPP data.	2021-2022 CAASPP Overall ELA Scores - Helendale 59% met or exceeded grade level standard 23% standard nearly met 18% standard not met		Increase the number of students that have met or exceeded grade level proficiency by 2% each year.
CAASPP Math Increase the number of students that have met or exceeded	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in math CAASPP in 2020-21. A baseline will be	2021-2022 CAASPP Overall Math Scores - Helendale 48% met or exceeded grade level standard		Increase the number of students that have met or exceeded grade level proficiency by 2% each year.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
grade level proficiency by 2% each year.		developed from 2021-22 CAASPP data.	22% standard nearly met 30% standard not met		
i-Ready ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready ELA Fall Scores ALL Tier 1: 62.2% Tier 2: 23.7% Tier 3: 14.1% English Learners Tier 1: 42.9% Tier 2: 35.7% Tier 3: 21.4% Economically Disadvantaged Tier 1: 62.1% Tier 2: 18.6% Tier 3: 19.3% Students w/ IEPs Tier 1: 40% Tier 2: 27.5% Tier 3: 32.5%	2022 i-Ready ELA Spring Scores ALL Tier 1: 76% Tier 2: 15.2% Tier 3: 8.8% English Learners Tier 1: 65.2% Tier 2: 8.7% Tier 3: 26.1% Economically Disadvantaged Tier 1: 66.5% Tier 2: 21.9% Tier 3: 11.6% Students with IEPs Tier 1: 46.7% Tier 2: 20% Tier 3: 33.3%	2023 i-Ready ELA Spring Scores ALL Tier 1: 76.3% Tier 2: 13.1% Tier 3: 10.5% English Learners Tier 1: 56.3% Tier 2: 18.8% Tier 3: 25% Economically Disadvantaged Tier 1: 69.8% Tier 2: 16.5% Tier 3: 13.6% Students with IEPs Tier 1: 34.8% Tier 2: 19.6% Tier 3: 45.7%		Decrease Tier III percentage by 2% each year
i-Ready Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready Math Fall Scores ALL Tier 1: 47.4% Tier 2: 30.9% Tier 3: 21.7%	2022 i-Ready Math Spring Scores ALL Tier 1: 68.3% Tier 2: 19.6% Tier 3: 12.1%	2023 i-Ready Math Spring Scores ALL Tier 1: 68.8% Tier 2: 20.2% Tier 3: 11.1%		Decrease Tier III percentage by 2% each year

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	English Learners Tier 1: 51.9% Tier 2: 25.9% Tier 3: 22.2% Economically Disadvantaged Tier 1: 48.2% Tier 2: 26.6% Tier 3: 25.2% Students w/ IEPs Tier 1: 27.5% Tier 2: 22.5% Tier 3: 50%	English Learners Tier 1: 65.2% Tier 2: 17.4% Tier 3: 17.4% Economically Disadvantaged Tier 1: 62.6% Tier 2: 21.5% Tier 3: 15.9% Students with IEPs Tier 1: 39.7% Tier 2: 19% Tier 3: 41.4%	English Learners Tier 1: 75% Tier 2: 6.3% Tier 3: 18.8% Economically Disadvantaged Tier 1: 62.1% Tier 2: 25.5% Tier 3: 12.3% Students with IEPs Tier 1: 30.4% Tier 2: 19.6% Tier 3: 50%		
Increase ELPAC levels annually	A baseline will be developed from 2021-22 Summative ELPAC data.	Summative ELPAC results will be published by the state in the summer or fall of 2022.	Summative ELPAC results will be published by the state in the summer or fall of 2023.		Increase ELPAC proficiency by 2% each year.
State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with 2021 local indicator outcomes.	Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.	Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.		Excel Academy will maintain implementation and sustainability of the State Standards against the CDE State Standards Reflection Tool.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.	Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.		
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach		Maintain 100% of teachers are appropriately credentialed for the courses they teach
State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials		Excel Academy will maintain the availability of online, textbook, and teacher created curriculum to meet the individual needs of our students

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Achievement	1.1 Excel Academy will increase the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in language arts and mathematics through a database system that collects individual formative and summative data. Data collection and analysis includes statewide and internal assessments as measured by the Dashboard and accountability systems.		No
1.2	Student Monitoring	1.2 Monitor low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments to review student learner outcomes and ensure academic success as well as social and emotional wellness, or refer to the RTI, SST, or IEP team. Offer programs like the "What I Need" WIN intervention program to provide instruction and resources n to promote academic growth, in addition to social-emotional awareness classes and character building.		Yes
1.3	Broad Course of Study	1.3 All students have access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels assisting students in completing standards-aligned content. (All Students) • Online courses, credit recovery, core programs • Supplemental curriculum and materials supporting Common Core Standards • Extended School year • Curriculum aligned to Common Core • English Language Development (ELD) curriculum	$6,267,670.00	No
1.4	Professional Development	1.4 Professional development opportunities for teachers and administrators to equip them with information and resources to better serve students and parents, for example, tools for goal setting and	$49,640.00	No

Action #	Title	Description	Total Funds	Contributing
		curriculum pacing, identifying, supporting, and monitoring students in the "What I Need" (WIN) and English Language Development (ELD) program. Professional development through organizations such as CSSA (California Charter School Association), CSDC (Charter School Development Center) and APLUS+.		
1.5	Parent Training	1.5 Provide parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and ToR parent training.		Yes
1.6	Grade Level Curriculum and Instruction	1.6 Students will be provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.		No
1.7	Student Monitoring and Support	1.7 Identify, support, and monitor students performing one or more years below grade level through the "What I Need" (WIN) intervention program. Students are required to participate in weekly intervention programs that are monitored by the credentialed ToR (Teacher of Record). Students who are performing below grade level on the fall i-Ready assessments will be required to take the mid-year i-Ready assessment(s).	$31,378.00	Yes
1.8	Needs Assessment - Data Analysis	1.8 Use data analysis and historical tracking of performance on internal and state testing to drive our policies, curriculum, and program decisions.	$4,945.00	No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 1 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness of 1.1: Excel Academy increased the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in English language arts and mathematics.
Effectiveness of 1.2: Excel Academy monitored low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on local assessments to review student learner outcomes and ensure academic success. In addition, Excel Academy successfully implemented and offered programs to promote academic growth as well as social-emotional learning (SEL) and awareness and character building. Students attended the offered sessions and connected with their peers.
Effectiveness of 1.3: All students were provided access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels and were assisted, supported, and guided in completing standards-aligned content by their assigned Teacher of Record (ToR).
Effectiveness of 1.4: The staff has attended professional development throughout the year to provide best practices and services to serve students and parents. Students and parents are provided with the necessary information, resources, and support to meet the individual needs of the student.
Effectiveness of 1.5: Parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and ToR parent training were provided to all parents.
Effectiveness of 1.6: Students were provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.
Effectiveness of 1.7: Students performing one or more years below grade level through the What I Need (WIN) intervention program were monitored throughout the school year and provided with individualized support. Students were required to participate in weekly intervention programs that are monitored by the credentialed ToR. Students who were performing below grade level on the fall i-Ready assessments were required to take the mid-year i-Ready assessment(s).
Effectiveness of 1.8: Excel Academy has analyzed and tracked the historical i-Ready data to drive our policies, curriculum, and program decisions. The results have influenced the decision to target specific students who need live instruction and additional curriculum and

resources to meet targeted goals. The effectiveness of 1.8 relates to the effectiveness of 1.7 because this targeted analysis provided the intervention department with the data to identify students who were performing below grade level and who needed the additional support. Once the CAASPP data is collected from 2023, the data will be analyzed and the staff will determine the domains that need to be targeted within ELA and math across specific grade levels.

Impact on Student Learning: Students have benefited academically from the increase of support provided by EACS teachers and intervention teams. They have observed an increase in student performance on the i-Ready local assessment, strong CAASPP baseline results, and graduation rates. They have also observed an increase in student participation in interventions and services to support academic achievement.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
2	We will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.

An explanation of why the LEA has developed this goal.

Maintenance Goal:
We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal and actions/services are focused on student, family, and teacher engagement and connectedness to attain a high average daily attendance.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Maintain or decrease Chronic Absenteeism rate of .01%	A baseline will be developed from 2020-21 data	Cumulative Enrollment: 521, 8 Chronic Absenteeism Count, Chronic Absenteeism Rate: 1.5%	Cumulative Enrollment: 545, 7 Chronic Absenteeism Count, Chronic Absenteeism Rate: 1.1%		Maintain an Absenteeism Rate.of .01% or lower
Strive for 0% Expulsion Rate each year	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate		Maintain 0% Expulsion Rate
Strive for 0% Suspension Rate each year	0% Suspension Rate	0% Suspension Rate	0% Suspension Rate		Maintain 0% Suspension Rate

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach		Maintain 100% of teachers are appropriately credentialed for the courses they teach.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	School Climate and Student Engagement	2.1 Focus on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides.	$27,922.00	No
2.2	Certificated and Classified Salaries and Benefits	2.2 Recruit and retain highly qualified multiple and single-subject teachers and classified staff, maintaining appropriate assignments and remaining competitive with salary and benefits.	$83,136.00	No
2.3	Educational Partner Communication	2.3 Frequent communication with parents/students to notify them of school events, opportunities, and resources through Beehively, email, the school website, and social media platforms. We will build partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.	$12,488.00	No

Action #	Title	Description	Total Funds	Contributing
2.4	Technology	2.4 Purchase technological devices and provide professional development to promote student engagement and develop 21st Century skills and support access to instruction as needed.	$68,000.00	No
2.5	Professional Development	2.5 Professional development in cultural awareness.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 2 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 2.1: Excel Academy focused on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides. Excel Academy is transparent in terms of making sure that parents and guardians are aware of the policies, procedures, and requirements that are in place.
Effectiveness 2.2: Excel Academy recruited and retained highly qualified multiple and single-subject teachers and classified staff, and was able to maintain appropriate assignments and competitive salaries and benefits.
Effectiveness 2.3: Excel Academy provided frequent communication with parents/guardians/students by notifying them of school events, opportunities, and resources through our main communication platform called Beehively, emails, the school website, and social media platforms. Excel Academy built partnerships for student outcomes by sending notification of surveys, parent informational meetings (i.e. ELAC, SSC, and PAC), and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.
Effectiveness 2.4: Excel Academy focused on purchasing technological devices and provided professional development to promote student engagement, support, and access to instruction as needed.

Effectiveness 2.5: Excel Academy focused on providing cultural awareness by inviting students and parents to share about their cultures and traditions during ELAC and SSC meetings which increased meeting attendance and helped to foster cultural awareness.

Impact on Student Learning: There has been an increase in student attendance, in addition to an increase of student participation in SEL lessons, ELD Live, and WIN intervention classes. Attendance and the interventions in place supported progress in both ELA and mathematics as indicated by internal data results.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
3	We will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.

An explanation of why the LEA has developed this goal.

Maintenance Goal:
Establishing connections and partnerships in education with our students and parents correlates with students attending school more regularly, earning higher grades, and graduating from high school. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2020-2021 Maintain or increase by 2%	Year 1 Outcome - 2021-2022 220 Responses from Educational Partners There were more responses that impacted the overall percentages. With a 96% and 98% approval rate, Excel Academy is excelling in all areas mentioned below.	Year 2 Outcome - 2022-2023 304 Responses from Educational Partners There were more responses that impacted the overall percentages. Excel Academy is excelling in all areas mentioned below.		Maintain or Increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 6: Overall Satisfaction Rate Survey Results Maintain or increase by 2% each year	Overall Satisfaction Report: Based on 66 responses from parents/guardians 97.6% of survey respondents agree that the school has supported students attaining their academic goals. 98.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.	Overall Satisfaction Report: Based on 220 responses from parents/guardians 96.4% of survey respondents agree that the school has supported students attaining their academic goals. 98.2% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.2% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.	Overall Satisfaction Report: Based on 304 responses from parents/guardians 95.7% of survey respondents agree that the school has supported students attaining their academic goals. 96.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.4% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.		Maintain or Increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Safety Plan Review and Training	Annual Review/Updates and Training Dates	The school safety plan was last reviewed and updated with staff in March of 2022.	The school safety plan was last reviewed and updated with staff in March of 2023.		Annual Review and Training Date

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Educational Partner Engagement	3.1 We will seek parent input and assess our level of educational partner engagement through parent participation in LP, ELAC, SSC, and PAC meetings, surveys, and Student Council, SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have opportunities for participation and input.		No
3.2	Educational Partner Partnerships	3.2 We will engage our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success.	$213,551.00	Yes
3.3	School Climate	3.3 We will build relationships by ensuring that all parents, students, and teachers feel that our schools are providing a safe, positive, inclusive, and welcoming learning environment.	$33,870.00	No
3.4	Student Services	3.4 Properly vet all newly hired Content and Community Providers to ensure standards alignment and safety for our students.	$31,572.00	No
3.5	School Climate and School Safety	3.5 The charter will continue to maintain a safe learning environment for all students by training the teachers and staff on school-wide safety plans.		No

Action #	Title	Description	Total Funds	Contributing
3.6	Communication and Translating Services	3.6 Notices, reports, statements, or records sent to a student, parent, or guardian will be translated as needed. Documents, records, and statements will be sent upon request by clerical staff.	$3,250.00	Yes
3.7	School Operating Services	3.7 Operations of the charter are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 3 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 3.1: Excel Academy sought out parent input and assessed our level of educational partner engagement through parent participation in Learning Period (LP), ELAC, SSC, and PAC meetings, surveys, Student Council, and SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have had opportunities for participation and input.
Effectiveness 3.2: Excel Academy engaged educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success. EACS built partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.

Effectiveness 3.3: Based on the survey results and stakeholder feedback, Excel Academy successfully built relationships by ensuring that all parents, students, and teachers felt that our school provided a safe, positive, inclusive, and welcoming learning environment.
Effectiveness 3.4: Excel Academy properly vetted all newly hired Content and Community Providers to ensure standards alignment and safety for our students were met at all times.
Effectiveness 3.5: Excel Academy maintains a safe learning environment for all students by training the teachers and staff on school-wide safety plans. The school-wide safety plans are updated as deemed necessary and appropriate and shared with stakeholders to provide transparency and accountability. The safety plan may be viewed upon request. The school safety plan ensures emergency preparedness at learning period meetings, test sites, field trips, staff meetings, and at the school office. It also encompasses required trainings and school expectations in regards to a mandated reporter, sexual harassment, blood borne pathogens, and active shooters. The expectations of conduct for students, parents, guardians, and staff, bullying and hate crime reporting are also included.
Effectiveness 3.6: Excel Academy notices, reports, statements, or records sent to a student, parent, or guardian were translated as needed and upon request. Documents, records, and statements were sent upon request by clerical staff.
Effectiveness 3.7: Operations of Excel Academy are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.

Impact on Student Learning: Increase in participation on the LCAP/WASC feedback survey for all educational partners. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships. EACS recognizes a continued need to increase parent participation in SSC, ELAC and PAC meetings.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
4	We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all Educational Partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.

An explanation of why the LEA has developed this goal.

Broad Goal:
With a focus on supporting our students to achieve their goal of high school graduation and college and career preparedness, the goal and actions/services focuses on monitoring each student's progress toward graduation. The continual monitoring of student data to identify struggling students and interventions is important to the success of our students staying on-track with course completion and on course to graduation. Graduation rate, college/career preparedness, and CTE participation are all metrics we monitor to ensure students are on track to graduate and to achieve their post-graduation goals.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Graduation Rate Dropout Rate	Develop a baseline from 2020-21 data.	2020-21: 93.8% Graduation Rate 2020-21: 6.3% Dropout Rate	2021-22: 100% Graduation Rate 2021-22: 0% Dropout Rate		Increase the graduation rate by 2%
Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU preparedness	2020-21: Number of Students participating in CTE: 11	2021-22: Number of Students participating in CTE: 13		Increase the % of College/Career Prepared students by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Access to a Broad Curriculum: College/Career Prepared Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	2019-20 Graduates completed all courses for UC/CSU Admission: 0	2020-21: Students enrolled in UC/CSU required courses for admission: 54.43% Completed All Courses Required for UC/CSU Admission: 0	2021-22: Students enrolled in UC/CSU required courses for admission: 34 Completed All Courses Required for UC/CSU Admission: 0		Increase the A-G course participation and completion annually by 2% to increase the College/Career Prepared Rate

Actions

Action #	Title	Description	Total Funds	Contributing
4.1	College and Career Readiness and Career Technical Education	4.1 Consistent with California College and Career Indicators, develop a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals; continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.	$8,200.00	No
4.2	High School Graduation	4.2 Students transitioning from middle to high school will be monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.	$107,374.00	No
4.3	High School Curriculum and Instruction	4.3 Provide high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.	$322,034.00	No

Action #	Title	Description	Total Funds	Contributing
4.4	Testing	4.4 Ensure all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities.	$76,742.00	Yes
4.5	Testing	4.5 Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.		Yes
4.6	A-G and Career Technical Education Courses	4.6 Expand our A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.	$16,346.00	No
4.7	Needs Assessment - Data Analysis	4.7 Analyze 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Provide targeted interventions and resources to students identified as needing additional support.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 4 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 4.1: Consistent with California College and Career Indicators, Excel Academy has developed a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals, and continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.
Effectiveness 4.2: Students transitioning from middle to high school are monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.
Effectiveness 4.3: Excel Academy provides high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Excel Academy works to review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.
Effectiveness 4.4: Excel Academy ensures all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities. Grade level test prep packets in ELA and math, the teacher led performance task prep sessions, and practice tests are designed to assist students in preparation for testing.
Effectiveness 4.5: Excel Academy covers the Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.
Effectiveness 4.6: Excel Academy is working to expand A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.
Effectiveness 4.7: Excel Academy analyzes 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Excel Academy provides targeted interventions and resources to students identified as needing additional support.

Impact on Student Learning: 34 students enrolled in UC/CSU required courses for admission. Excel Academy removed barriers such as Advanced Placement exam costs for low income and foster-youth students experiencing financial hardship, and observed greater student interest in Advanced Placement (AP), CTE, and A-G courses. The continued goal is to increase enrollment in these courses.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2023-24]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
483,278.00	0.00

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
8.45%	0.00%	$0.00	8.45%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

As provided in the Academic Achievement metrics sections, the ELA i-Ready Diagnostic results demonstrate that:
2023 i-Ready ELA Spring Scores

ALL

Tier 1: 76.3%

Tier 2: 13.1%

Tier 3: 10.5%

English Learners

Tier 1: 56.3%

Tier 2: 18.8%

Tier 3: 25%

Economically Disadvantaged
Tier 1: 69.8%
Tier 2: 16.5%
Tier 3: 13.6%

Students with IEPs
Tier 1: 34.8%
Tier 2: 19.6%
Tier 3: 45.7%

As provided in the Academic Achievement metrics sections, the math i-Ready Diagnostic results demonstrate that:
2023 i-Ready Math Spring Scores
ALL
Tier 1: 68.8%
Tier 2: 20.2%
Tier 3: 11.1%

English Learners
Tier 1: 75%
Tier 2: 6.3%
Tier 3: 18.8%

Economically Disadvantaged

Tier 1: 62.1%

Tier 2: 25.5%

Tier 3: 12.3%

Students with IEPs

Tier 1: 30.4%

Tier 2: 19.6%

Tier 3: 50%

How the action(s) intend to meet the needs of students served by the action:

To address these needs in reference to the data, Excel Academy Charter School is focused on increasing the quality and quantity of services by actively using data systems to engage in in-depth analysis of student records, local and state assessment data to accurately assess student progress and develop appropriate interventions and accelerations to support Low Income pupils, Foster Youth, English Learners, and Students With Disabilities to support academic success or refer to the RTI, SST or IEP team.

Excel Academy Charter School's LCAP is focused on providing services and support for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) with the use of supplemental funding that is directed toward unduplicated students to increase and improve services for students who are low income, English Learners, foster youth, and/or homeless. Through educational partner collaboration and input, and the review of our local assessments, data was analyzed to address specific identified student needs and learning gaps. Actions and services were identified to determine the appropriate and effective use of funds to meet the needs and improve the outcomes for all students.

Goal 1 focuses on providing quality curricula to students and using assessments in reading and math to ensure they are meeting the state standards. Action 1.4 focuses on improving the quality of services through relevant and ongoing professional development that addresses topics such as goal setting, creating pacing guides and best practices for supporting high school students. This action is important for the success of all students, but is particularly important to the achievement of English Learners, foster youth, low-income students, and students with disabilities (SWDs). Action 1.5 focuses on improving services in quality by providing parent training and workshops to equip parents in all aspects of education, including expectations and requirements, choosing a standards-based curriculum, and how to locate school-sponsored field trips and approved community partners to help enrich the learning experience. ELAC meetings are held regularly to support parents in understanding the ELD (English Language Development) curriculum, accessing resources, and ensuring they are informed about

the reclassification process. This is effective in meeting the needs of these subgroups because when parents are engaged and informed, they are more likely to take advantage of the resources offered and provide valuable input which leads to improved services for their students. Action 1.7 focuses on monitoring and supporting students in the What I Need (WIN) program. Teachers receive updated training each year and monitor students in the program weekly. This action benefits our underrepresented students because if they are behind grade level they receive personalized intervention lessons to fill in learning gaps and support progress in their grade-level curriculum. This ensures that these students receive individualized attention and do not fall behind.

Goal 3 targets community-building among all of our educational partners. To best support student growth and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs), we strive to foster engagement, involvement, and satisfaction so that all educational partners have input in school policy and program decisions. Action 3.6 ensures that important materials, documents, and conversations are translated for our EL students and their families. This helps cultivate a sense of collaboration and guards against confusion and misunderstanding.

Our actions and services in Goal 4 increase services by monitoring students as they transition into high school and ensuring that they stay on course with their 4-Year Plan. Action 4.4 ensures that all students, and especially our English Learners, students with disabilities (SWD), foster youth and low-income students have access to test preparation materials to support student achievement on the CAASPP and i-Ready assessments. This results in higher achievement for all students. Action 4.5 is in place to make sure that foster youth and low income students have the opportunity to take AP examinations regardless of their financial status. This is effective because it is an attempt to remove any barriers low income students might have to college and career readiness.

All of our goals and actions were created with all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) in mind. It is our deepest desire that each of these student groups would receive the attention and support needed to ensure their emotional and academic success. We are confident these actions will be effective in helping our school meet the goals set for these student groups because our data supports that clear communication with families, ongoing teacher communication, encouragement and support, and access to academic intervention have a significant impact in increasing student engagement and achievement. With the help of staff, teacher and parent feedback, we have been able to identify the actions that will be most effective in closing learning gaps and making certain that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) feel connected to their school and its personnel.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Services for our low-income, English Learners, and foster youth are targeted interventions that were identified through a collaborative effort with the school's Executive Director, Director of Assessment and Accountability, Assistant Director of Intervention, High School Principal, and High School Counselors. The goals and actions in the LCAP are focused on increasing services and improving the quality of the academic support to improve student performance, educational partner engagement, and the level of college and career readiness of our student groups. Through a collaborative effort, the school leadership team, taking into account the feedback provided from all educational partners, identified the next steps to growth towards each of our goals. We expect to see improvement in student engagement and achievement as reflected in i-Ready and CAASPP test scores, and an increase in our graduation and college and career readiness rate.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	N/A	N/A
Staff-to-student ratio of certificated staff providing direct services to students	N/A	N/A

2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$7,215,507.00	$127,186.00		$15,425.00	$7,358,118.00	$4,420,193.00	$2,937,925.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Achievement	All					
1	1.2	Student Monitoring	English Learners Foster Youth Low Income					
1	1.3	Broad Course of Study	All	$6,267,670.00				$6,267,670.00
1	1.4	Professional Development	All	$6,800.00	$42,840.00			$49,640.00
1	1.5	Parent Training	English Learners Foster Youth Low Income					
1	1.6	Grade Level Curriculum and Instruction	All					
1	1.7	Student Monitoring and Support	English Learners Foster Youth Low Income	$15,953.00			$15,425.00	$31,378.00
1	1.8	Needs Assessment - Data Analysis	All	$4,945.00				$4,945.00
2	2.1	School Climate and Student Engagement	All	$27,922.00				$27,922.00
2	2.2	Certificated and Classified Salaries and Benefits	All	$83,136.00				$83,136.00
2	2.3	Educational Partner Communication	All	$12,488.00				$12,488.00
2	2.4	Technology	All		$68,000.00			$68,000.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
2	2.5	Professional Development	All					
3	3.1	Educational Partner Engagement	All					
3	3.2	Educational Partner Partnerships	English Learners Foster Youth Low Income	$213,551.00				$213,551.00
3	3.3	School Climate	All	$33,870.00				$33,870.00
3	3.4	Student Services	All	$31,572.00				$31,572.00
3	3.5	School Climate and School Safety	All					
3	3.6	Communication and Translating Services	English Learners	$3,250.00				$3,250.00
3	3.7	School Operating Services	All					
4	4.1	College and Career Readiness and Career Technical Education	All	$8,200.00				$8,200.00
4	4.2	High School Graduation	All	$107,374.00				$107,374.00
4	4.3	High School Curriculum and Instruction	All	$322,034.00				$322,034.00
4	4.4	Testing	English Learners Foster Youth Low Income	$76,742.00				$76,742.00
4	4.5	Testing	English Learners Foster Youth Low Income					
4	4.6	A-G and Career Technical Education Courses	All		$16,346.00			$16,346.00
4	4.7	Needs Assessment - Data Analysis	All					

2023-24 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
5,718,602	483,278.00	8.45%	0.00%	8.45%	$309,496.00	0.00%	5.41 %	**Total:**	$309,496.00
								LEA-wide Total:	$309,496.00
								Limited Total:	$0.00
								Schoolwide Total:	$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	**1.2**	Student Monitoring	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
1	**1.5**	Parent Training	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
1	**1.7**	Student Monitoring and Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$15,953.00	
3	**3.2**	Educational Partner Partnerships	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$213,551.00	
3	**3.6**	Communication and Translating Services	Yes	LEA-wide	English Learners	All Schools	$3,250.00	
4	**4.4**	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$76,742.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
4	**4.5**	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		

2022-23 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	$5,976,254.36	$0.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	**1.1**	Student Achievement	No		
1	**1.2**	Student Monitoring	Yes		
1	**1.3**	Broad Course of Study	No	$5,040,363.00	
1	**1.4**	Professional Development	No	$29,538.00	
1	**1.5**	Parent Training	Yes		
1	**1.6**	Grade Level Curriculum and Instruction	No		
1	**1.7**	Monitoring Student Performance	Yes	$165,150.00	
1	**1.8**	Needs Assessment - Data Analysis	No	$11,050.00	
2	**2.1**	School Climate and Student Engagement	No	$20,310.00	
2	**2.2**	Certificated and Classified Salaries and Benefits	No	$505,622.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.3	Educational Partner Communication	No	$2,403.00	
2	2.4	Technology	No	$26,779.00	
2	2.5	Professional Development	No		
3	3.1	Educational Partner Engagement	No		
3	3.2	Educational Partner Partnerships	Yes	$40,364.00	
3	3.3	School Climate	No	$4,500.00	
3	3.4	Student Services	No	$22,234.36	
3	3.5	School Climate and School Safety	No		
3	3.6	Communication and Translating Services	Yes	$3,250.00	
3	3.7	School Operating Services	No		
4	4.1	College and Career Readiness and Career Technical Education	No	$8,200.00	
4	4.2	High School Graduation	No	$85,491.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	**4.3**	High School Curriculum and Instruction	No		
4	**4.4**	Testing	Yes	$11,000.00	
4	**4.5**	Testing	Yes		
4	**4.6**	A-G and Career Technical Education Courses	No		
4	**4.7**	Needs Assessment - Data Analysis	No		

2022-23 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
	$179,400.00	$0.00	$0.00	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.2	Student Monitoring	Yes				
1	1.5	Parent Training	Yes				
1	1.7	Monitoring Student Performance	Yes	$165,150.00			
3	3.2	Educational Partner Partnerships	Yes				
3	3.6	Communication and Translating Services	Yes	$3,250.00			
4	4.4	Testing	Yes	$11,000.00			
4	4.5	Testing	Yes				

2022-23 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
		0.00	0.00%	$0.00	0.00%	0.00%	$0.00	0.00%

Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [*EC*] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (*EC* Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (*EC* Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).

    - Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the "Red" or "Orange" performance category or any local indicator where the LEA received a "Not Met" or "Not Met for Two or More Years" rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the "all student*"* performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified**: Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools**: Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness**: Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc/.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:
For county offices of education and school districts only, verify the LEA:

a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.

b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.

d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.

e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: "A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP."

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

Prompt 2: "A summary of the feedback provided by specific educational partners."

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: "A description of the aspects of the LCAP that were influenced by specific input from educational partners."

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, "aspects" of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.

- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.

- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)
Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal
Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal
Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals
In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.

- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:
For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric**: Indicate how progress is being measured using a metric.
- **Baseline**: Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome**: When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome**: When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome**: When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24**: When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the "**Measuring and Reporting Results**" part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2022–23**. Leave blank until then.	Enter information in this box when completing the LCAP for **2023–24**. Leave blank until then.	Enter information in this box when completing the LCAP for **2024–25**. Leave blank until then.	Enter information in this box when completing the LCAP for **2021–22** or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

> ***Actions for English Learners:*** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.
>
> ***Actions for Foster Youth***: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

***Projected Percentage to Increase or Improve Services for the Coming School Year*:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 *CCR* Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

> After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])
>
> In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])
>
> These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Consistent with the requirements of 5 *CCR* Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
    - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
    - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
    - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
    - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
    - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
    - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
    - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
    - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
    - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
    - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

      The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
    - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education
January 2022

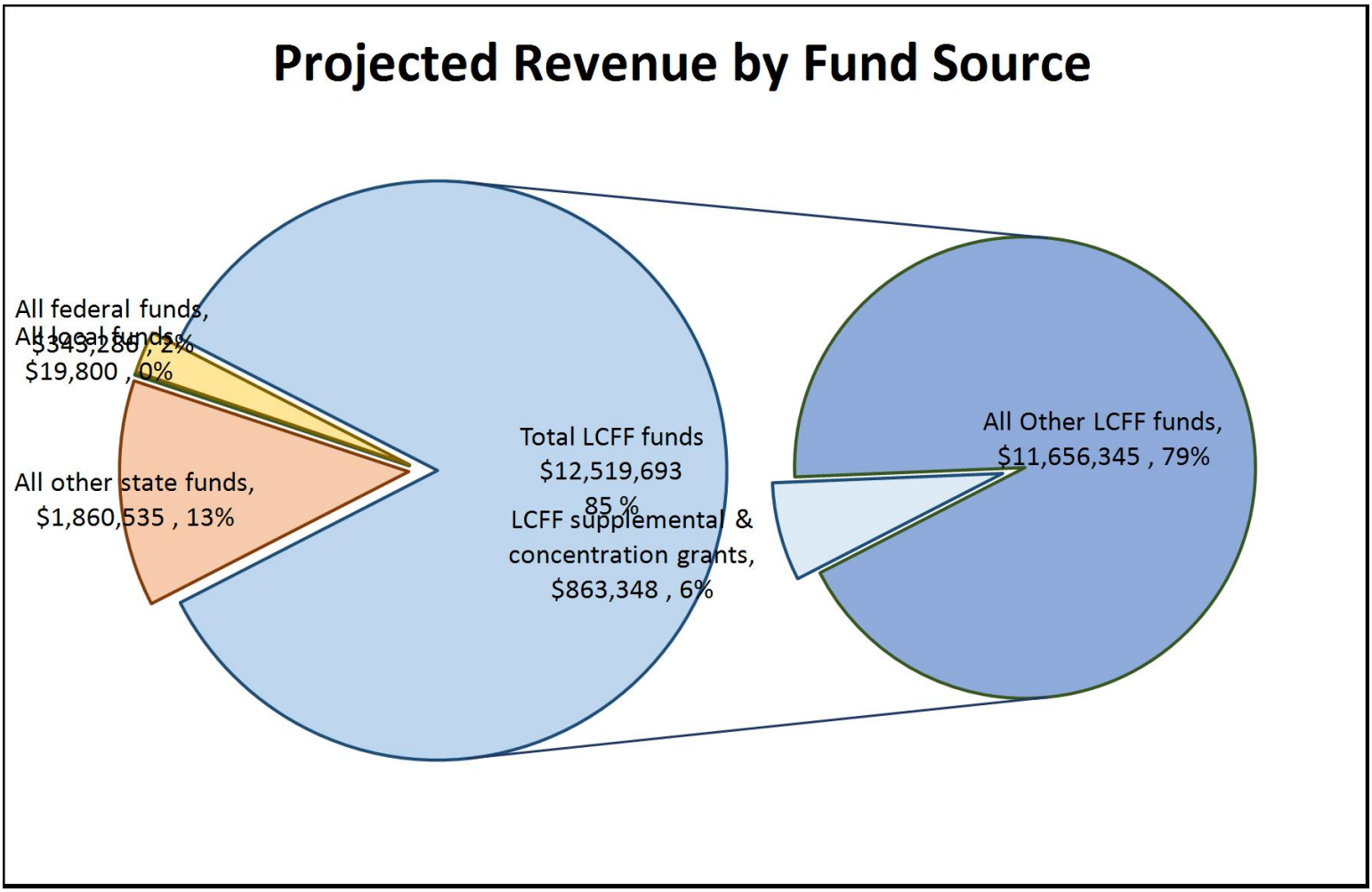
LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Excel Academy Charter School - Warner
CDS Code: California
School Year: 2023-24
LEA contact information:
Heidi Gasca
Executive Director

(949) 412-3122

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

Budget Overview for the 2023-24 School Year

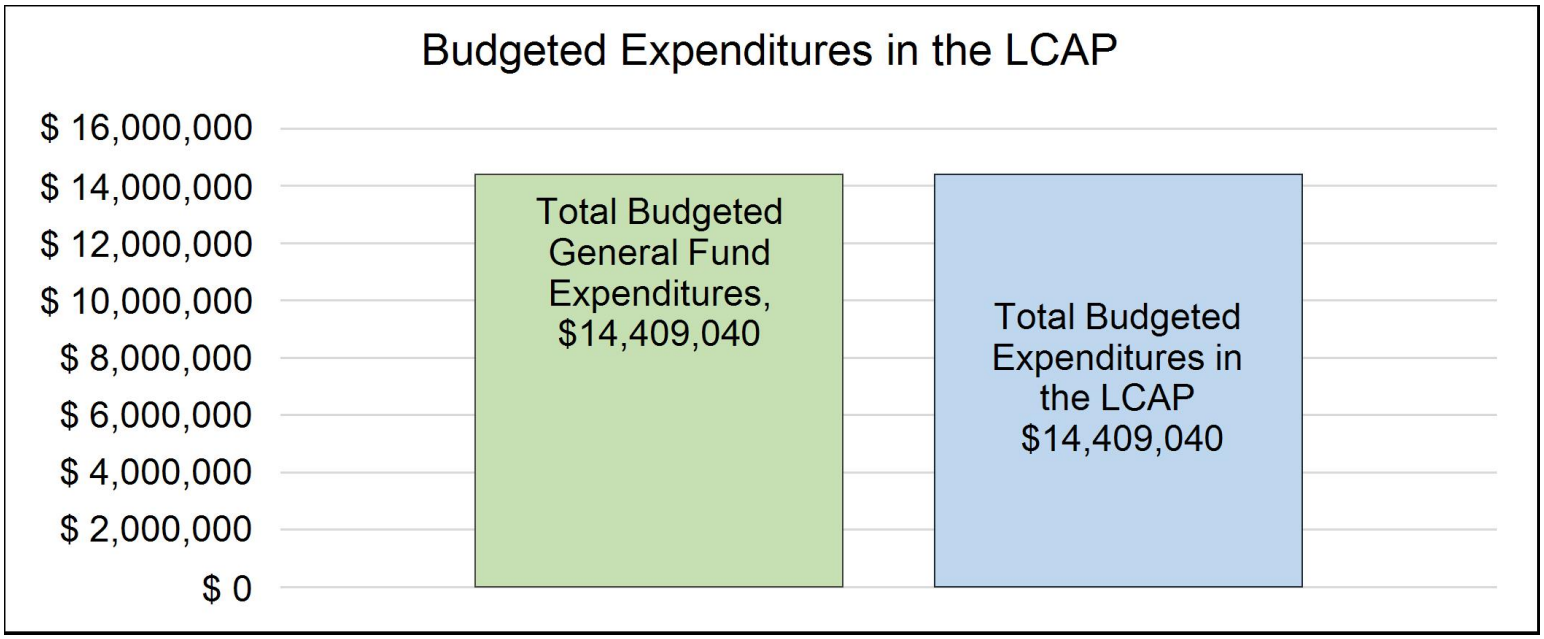


This chart shows the total general purpose revenue Excel Academy Charter School - Warner expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Excel Academy Charter School - Warner is $14,743,314, of which $12,519,693 is Local Control Funding Formula (LCFF), $1,860,535 is other state funds, $19,800 is local funds, and $343,286 is federal funds. Of the $12,519,693 in LCFF Funds, $863,348 is generated based on the enrollment of high needs students (foster youth, English learner, and low-income students).

LCFF Budget Overview for Parents

The LCFF gives school districts more flexibility in deciding how to use state funds. In exchange, school districts must work with parents, educators, students, and the community to develop a Local Control and Accountability Plan (LCAP) that shows how they will use these funds to serve students.



This chart provides a quick summary of how much Excel Academy Charter School - Warner plans to spend for 2023-24. It shows how much of the total is tied to planned actions and services in the LCAP.

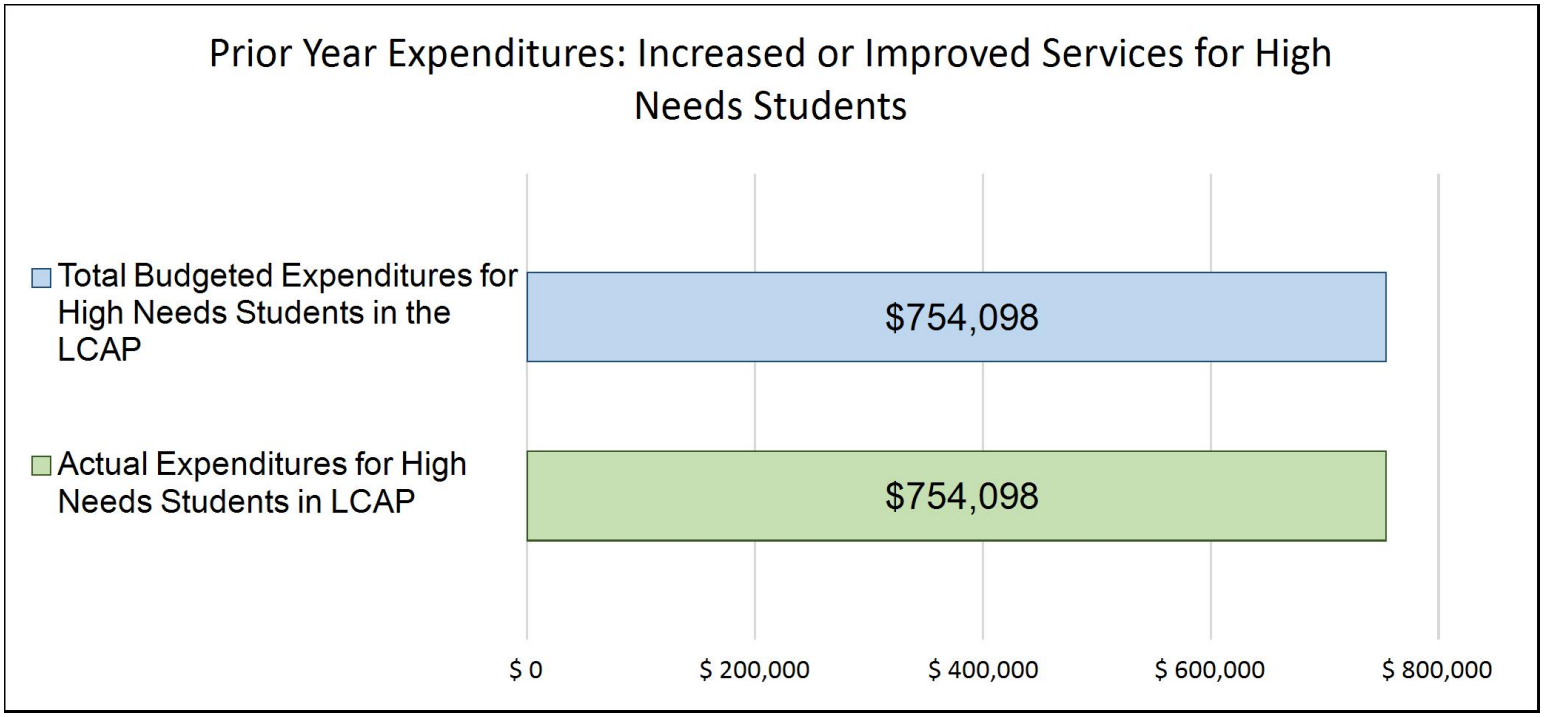
The text description of the above chart is as follows: Excel Academy Charter School - Warner plans to spend $14,409,040 for the 2023-24 school year. Of that amount, $14,409,040 is tied to actions/services in the LCAP and $0 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

Increased or Improved Services for High Needs Students in the LCAP for the 2023-24 School Year

In 2023-24, Excel Academy Charter School - Warner is projecting it will receive $863,348 based on the enrollment of foster youth, English learner, and low-income students. Excel Academy Charter School - Warner must describe how it intends to increase or improve services for high needs students in the LCAP. Excel Academy Charter School - Warner plans to spend $863,348 towards meeting this requirement, as described in the LCAP.

LCFF Budget Overview for Parents

Update on Increased or Improved Services for High Needs Students in 2022-23



This chart compares what Excel Academy Charter School - Warner budgeted last year in the LCAP for actions and services that contribute to increasing or improving services for high needs students with what Excel Academy Charter School - Warner estimates it has spent on actions and services that contribute to increasing or improving services for high needs students in the current year.

The text description of the above chart is as follows: In 2022-23, Excel Academy Charter School - Warner's LCAP budgeted $754,098 for planned actions to increase or improve services for high needs students. Excel Academy Charter School - Warner actually spent $754,098 for actions to increase or improve services for high needs students in 2022-23.

Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Warner	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

Plan Summary [2023-24]

General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Excel Academy Charter School is an non-classroom based California charter school offering a tuition-free personalized learning independent study model for students in grades TK-12 . Our high-quality, educational program is rooted in flexible learning, personalized schedules, and proven systems of support where credentialed teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student. Excel Academy is accredited by the Western Association of Schools and Colleges (WASC) which is a statement to the community and educational partners that the institution is reputable, student oriented, focused on quality education and student performance, and is committed to ongoing improvement. Excel Academy offers students various options for state-approved curriculum as well as academic and elective services using instructional funds provided by the charter school. With the support and guidance of a highly-qualified credentialed teacher, students build a customized learning plan based on individual educational goals. Teachers, students, and parents consistently collaborate to properly pace and design an instructional schedule to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. Excel Academy operates on a traditional school calendar with regularly scheduled holidays. Daily and weekly communication occurs between teachers, parents, and students to ensure academic progress as well as support for social and emotional success. In addition, families meet in person at least once every 20 school days to review assigned work, discuss student learning, celebrate successes, and set goals for the upcoming learning period (LP). Excel Academy believes in fostering strong educational partnerships between the school, parents, students, and stakeholders through continued communication, collaboration, and transparency.

Students enrolled in this school reside in urban, suburban, and rural areas throughout Orange, Riverside, and San Diego Counties. Excel Academy serves a diverse community of students and parents due to the nature of independent study. On CBEDS day 2022-23, Excel Academy Charter School- Warner reported an enrollment of 1048 students. This includes the enrollment of 39% socio-economically disadvantaged, 2.1% English Learners, 9.3% Special Education, 0% Homeless, and .1% Foster Youth. 28.8% of students enrolled in Excel Academy Charter School - Warner are Hispanic.

Mission Statement
Excel Academy will provide a flexible, personalized learning experience where teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student.

Our Vision
Life is what you create….at Excel Academy we bring students to LIFE through:

LEARNING: At Excel Academy students progress in knowledge, ability and social/emotional foundations. Curriculum and staff will provide a personalized learning plan inherent to the uniqueness of every student and learning situation. Excel Academy pursues a learning environment where every student will be challenged by, enjoy, and help direct their own education.

INDEPENDENCE: Excel Academy believes one of the key elements of an optimal education is to prepare each student for real-life complexities and independent learning. Excel Academy's curriculum options not only align to California's academic content standards but offer alternative and supplemental learning resources that place the student in a climate where curiosity and exploration are rewarded.

FLEXIBILITY: Flexible pacing enables each Excel Academy student, under the guidance of the teacher of record, to target individual needs without the demands of a classroom. By developing an awareness of their own unique learning style and advancement in their communication abilities, students and families will be enabled to discover their greatest areas of need and direct their efforts accordingly.

EMPOWERMENT: Excel Academy strives to empower students to take ownership of their education and develop not only the appropriate knowledge, skills, and abilities, but also the confidence, creativity, and discipline to help them adapt to challenges and opportunities.

Reflections: Successes

A description of successes and/or progress based on a review of the California School Dashboard (Dashboard) and local data.

Excel Academy Charter School is most proud of the following:

1) This year, the California Distinguished Schools program recognized Excel Academy for their excellent work in closing the achievement gap and achieving exceptional student performance.

2) The dedication of the EACS staff has proven to ensure consistent and valued communication between all educational partners. The number one priority is the success of the students academically, socially, and emotionally. With systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the recent LCAP survey results, parents and students agree that Excel Academy is dedicated to providing an education that denotes excellence.

Parent/Guardian survey results:
93.8% of survey respondents "agree" that the overall school organization lends itself to efficiency and student achievement.
98.4% of the survey respondents “agree” that EACS provides students access to rigorous core content curriculum and resources for students to access and master grade level standards.
97% of the survey respondents “agree” that EACS and teachers clearly communicate academic expectations and encourage academic excellence.
97.4% of survey respondents “agree” that their child’s school has developed a partnership with them to support their child’s academic learning and achievement.

Student survey results:
100% of student survey respondents "agree" their Teacher of Record (ToR) is available to speak with them when they need guidance.
99.9% of student survey respondents "agree" that the ToR cares about their education and is committed to helping them succeed.
96.9% of student survey respondents "agree" the curriculum provides challenging grade level instruction and assessment of their academic progress.

3) Excel Academy offered a plethora of opportunities to build student engagement and peer connections through monthly Outdoor Classroom days where students collaborated on hands-on experiments tied to content standards, virtual learning lessons across all core subjects, and field trips throughout Southern California. In addition, Social Emotional Learning Lessons for students in grades K-12 were led by credentialed teachers and allowed students to connect with peers to learn important life skills. Excel Academy piloted a mental wellness survey for students in grades 7-12, and provided Care Solace to better support mental health of the educational partners. In addition, the Gifted Learner Program was launched and successfully well received. EACS students flourished as participants in the theater, Coder-Z, e-Sports, and Student Council programs.

4) Excel Academy's local assessment, i-Ready diagnostic benchmark assessments, were administered to measure student progress in the fall, winter, and spring during the 2022-2023 school year. Based on an analysis of our i-Ready fall and spring scores in ELA and Math, our school demonstrated success in decreasing the percentages of students in tiers 2 & 3 (one or more grade levels below the current grade level). 78.8% of our students are at or above grade level in ELA. Tier 1 (students at or above grade level) grew by 12% since the first diagnostic in September. 72.6% of our students are at or above grade level in math. Tier 1 (students at or above grade level) grew by 21% since the first diagnostic in September. Excel Academy attributes the progress and success to the consistent support and guidance of our

credentialed teachers, communication between teachers, students, and parents, the consistent completion of the i-Ready personalized lessons, and the interventions in place to provide specific
resources, supplements, and live instruction to close learning gaps and strengthen skills.

5) Our students in the "What I Need" WIN intervention program showed tremendous growth in six months after retaking the i-Ready assessments. In ELA, 67% of students showed 1+ years growth, and 58% in math. Progress has been made to implement additional classes to serve students who need focus on early reading and foundational math support during the 2023-24 school year.

6) English Learners were provided with grade level appropriate weekly live instruction in reading, writing, listening, and speaking to build English language fluency. The students enjoyed the sessions and we are looking forward to seeing the progress they have made on the Summative ELPAC score reports.

7) Excel Academy's 87.2% graduation rate, 0% suspension and expulsion rates, and low chronic absenteeism rate of 1.0% is a success we are very proud of!

8) In addition to continuing to increase the school’s A-G course offerings, Excel Academy continued to focus on increasing access to A-G courses with an emphasis on our 9th and 10th grade students. With great success, all core A-G required coursework is accessible for A-G completion. We introduced additional support for struggling students to meet Algebra 1 requirements and all students are are on track to complete the next math sequence.

We will maintain or build on our educational partner engagement success by:

1) Excel Academy will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and providing resources, support, and opportunities for all students to continue to grow as lifelong learners. Excel Academy will survey educational partners for feedback, and analyze the areas that we can maintain and improve upon.

2) Excel Academy will continue to offer opportunities for students to build rapport with peers while learning to enhance their social emotional well being through lessons and conversations.

3) Excel Academy will continue to assess students using i-Ready diagnostic benchmark assessments and encourage completion of personalized lessons to help strengthen skills and close learning gaps. In addition, Excel Academy will continue to provide grade level test prep packets, virtual test prep sessions, and practice tests to help prepare students for state testing. At Excel Academy, our goal is to strive for 100% participation in all areas of assessment.

4) Our English Learners will continue to be provided with the required English Language Development (ELD) curriculum and mandatory live instruction to help build English fluency in reading, writing, listening, and speaking.

5) Excel Academy will maintain and build on our high school graduation success by focusing on supporting students to achieve their goal of high school graduation through continual monitoring of student data to identify students who are struggling and provide interventions to assist students in overcoming barriers so they can be successful and stay on track to complete courses and graduate.

6) The High School Department is working to establish a more transparent A-G tracking system through our school information system for 2023-24.

Reflections: Identified Need

A description of any areas that need significant improvement based on a review of Dashboard and local data, including any areas of low performance and significant performance gaps among student groups on Dashboard indicators, and any steps taken to address those areas.

Excel Academy's administration will review the i-Ready and CAASPP data and create a plan to improve any areas that indicate low performance among student groups. In addition, Excel Academy's Intervention Department has provided the necessary resources and support, including live instruction, to students who recently scored in tier 2 and tier 3 on the spring i-Ready assessments. The team has also made it a priority to finalize the interventions and live instruction that will be in place for students who scored in tier 2 and tier 3 (one plus grade levels below the current grade levels) on i-Ready for the 23/24 school year. Our goal is to make sure that all students have the necessary interventions in place to progress and thrive in our model when school resumes.

LCAP Highlights

A brief overview of the LCAP, including any key features that should be emphasized.

Goal 1: Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. With a focus on supporting our students to achieve, the goal, along with the actions and services, focuses on monitoring each student's academic achievement. It is our top priority to continually monitor student data to identify struggling students and provide targeted interventions knowing this plays an integral role in preventing learning gaps and fostering student success. i-Ready, CAASPP, ELPAC, and end of course assessments are all metrics we monitor to ensure students are on track for graduation.

Goal 2: Excel Academy will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students maintain active engagement to learn and improve their performance. We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal, as well as the actions and services, focuses on student, family, and teacher engagement and connectedness in an effort to attain a high average daily attendance and ongoing student engagement in learning.

Goal 3: Excel Academy will establish connections and partnerships with our families and the school community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement. Effective, meaningful, and transparent communication provides all educational partners opportunities for input regarding policy and program improvement. Building strong connections with students and parents leads to increased student engagement and achievement. Increasing the number of parent input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and community partners.

Goal 4: Excel Academy will ensure that students are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all stakeholders will help ensure proper support is in place to prepare high school students for required internal and state assessments. The goal, as well as the actions and services, focuses on monitoring each student's progress toward graduation and ensuring preparedness for college and career. Continual monitoring of student data to identify struggling students and interventions is central to keeping students on-track with course completion and their 4-Year Plan towards graduation. Graduation Rate, College/Career Prepared, CTE participation, and CAASPP scores are all metrics we monitor to ensure students are on track to graduation and to achieve their post-graduation goals.

Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable to Excel Academy Charter School - Warner

Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable to Excel Academy Charter School - Warner

Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable to Excel Academy Charter School - Warner

Engaging Educational Partners

A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP.

Excel Academy Charter School is focused on providing effective and meaningful communication that will provide all educational partners opportunities for input in decision making that concerns the education of our students and the quality of our school program. Communication about opportunities to provide input is provided through social media platforms, including Beehively, as well as during SSC, ELAC, and PAC meetings. There were 304 participants in our LCAP Parent Input Survey with a 28% increase in survey respondents from the 2022/23 school year. 96.1% of survey respondents agree that EACS provides opportunities for parents to give input and participate in the school and child's education. Excel Academy shared the survey results with educational partners on 5/4/2023 and in our prior newsletters.

Meetings for the Annual Review of the LCAP Goals and actions/services to determine their effectiveness and any modifications that would need to be made in order to improve our school program:

Approach to engaging our Educational Partners:
The scheduling of LCAP input meetings were planned in collaboration with our educational partners.

Timeline of Process:
Staff: Staff and department meetings are held and the EACS team is engaged in the review of the school wide goals to provide input prior to the approval of the LCAP. LCAP surveys are provided to the entire staff and survey results are reviewed and shared.
Leadership Team: Monthly cabinet meetings were held.

Collaboration topics:
Excel Academy's mission and vision
Increase parent understanding for the need of student assessments and participation
Expand CTE classes
Focus on providing interventions and helping students set academic and personal goals
Professional development within all departments: general education (elementary and high school), assessment and special programs, interventions, and Special Education

ELAC: 9/7/2022, 11/2/2022, 2/1/2023, 5/3/2023
SSC: 9/13/2022, 11/3/2022, 2/2/2023, 5/4/2023
PAC: 11/1/2022, 5/1/2023
SELPA Approval: June 2023 submitted
School Board LCAP Draft Public Hearing: 6/15/2023
School Board LCAP Adoption Public Meeting: 6/22/2023

A summary of the feedback provided by specific educational partners.

Analysis of educational partner input (ideas, trends, or inputs):

The results of the Excel Academy Charter School (EACS) stakeholder input surveys provided our staff with an opportunity to identify trends in what stakeholders are saying about EACS and to collaborate on best practices to continue to support student success.

Educational Partner Input:
96.7% of survey respondents "agree" that EACS' vision and mission are clear and understandable.
93.8% of survey respondents "agree" that the overall school organization lends itself to efficiency and student achievement.
98.4% of the survey respondents “agree” that EACS provides students access to rigorous core content curriculum and resources for students to access and master grade level standards.
97% of the survey respondents “agree” that EACS and teachers clearly communicate academic expectations and encourage academic excellence.
93.4% of survey respondents “agree” that their student(s) set personal academic achievement goals.
93% of the survey respondents “agree” that the WIN (What I Need) intervention program provides the supplemental support that helps students improve in academic areas they may be struggling with.
92.4% of survey respondents "agree" that EACS uses assessment data to modify and monitor curriculum and instruction of students.
92.1% of survey respondents “agree” that they feel connected to the school, valued and respected.
97% of survey respondents “agree” that they feel safe and welcome to meet with their child’s teachers or school staff to discuss student progress.
97% of survey respondents “agree” that there is regular communication of their student’s progress.
97.4% of survey respondents “agree” that their child’s school has developed a partnership with them to support their child’s academic learning and achievement.
95.4% of survey respondents “agree” that the school demonstrates good effort in providing opportunities for involvement and input.
98% of high school parent survey respondents “agree” that the school provides support for high school students to be on the correct path to graduate from high school and become college and career ready.
97% of high school parent survey respondents “agree” that the school provides opportunities for high school students to participate in CTE courses or graduation pathways.
95.7% of survey respondents overall agree that the school supports students in their academic goals.
96.1% of survey respondents overall agree that the school provides opportunities for parents to give input and participate in student’s education.

In response to the survey input, the Director of Assessment and Accountability shared the survey results with educational partners to address trends in the input. The response to input was shared during the ELAC and SSC meetings in May, in addition with the staff in March and educational partners in the April and May newsletters. There was no input that directly affected the LCAP goals and actions besides helpful suggestions to help strengthen the programs that are offered. The most consistent trend we found was praise for our school and appreciation for all of the resources provided to families. Sample responses include:

Educational Partner Input Trends:
"I am so pleased and impressed with Excel. I appreciate the team of teachers and professionals that have made our transition from a brick and mortar school to a virtual school so seamless. Our Teacher of Record is extremely responsive and creative in her supports to our family. Thank you!"
"Excel Academy staff is excellent!"
"Please continue with this outstanding approach to education, it is greatly appreciated!"
"Our ToR has been so instrumental in my daughters successes. I couldn't be more grateful for her!"
"I really appreciate your Vision and Mission statements. They are in alignment with what our family believes what educational institutions should be aiming."
"I believe we have everything possible with Excel to achieve my children's success in learning and can't think of anything else we may need in order to reach our goals."

A description of the aspects of the LCAP that were influenced by specific input from educational partners.

How the educational partner input influenced the development of the LCAP:
There was no input that directly affected the LCAP goals and actions.
The response to input was shared during the ELAC and SSC meetings in May, in addition with the staff in March and educational partners in the April and May newsletters.
Program Review: Prior to the finalization of the LCAP, stakeholders participated in a review of the LCAP draft during the ELAC and SSC meetings. The feedback consisted of clarifying questions about the program and overall support of our school and its programs.

Goals and Actions

Goal

Goal #	Description
1	Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.

An explanation of why the LEA has developed this goal.

Broad Goal:
With a focus on supporting student achievement, the goal and our actions/services focus on monitoring each student's academic achievement. Continual monitoring of student data to identify struggling students and interventions is important to the success of our students and helps prevent learning gaps. The metrics we utilize to ensure students are on track for graduation include i-Ready, CAASPP, and ELPAC.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in ELA CAASPP in 2020-21. A baseline will be developed from 2021-22 CAASPP data.	2021-2022 CAASPP Overall ELA Scores - Warner 66% met or exceeded grade level standard 22% standard nearly met 12% standard not met		Increase the number of students that have met or exceeded grade level proficiency by 2% each year.
CAASPP Math Increase the number of students that have met or exceeded grade level proficiency	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in math CAASPP in 2020-21.	2021-2022 CAASPP Overall Math Scores - Warner 54% met or exceeded grade level standard		Increase the number of students that have met or exceeded grade level proficiency by 2% each year.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
by 2% each year.		A baseline will be developed from 2021-22 CAASPP data.	26% standard nearly met 20% standard not met		
i-Ready ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready ELA Fall Scores ALL Tier 1: 65.7% Tier 2: 23.6% Tier 3: 10.7% English Learners Tier 1: 39.5% Tier 2: 32.6% Tier 3: 27.9% Economically Disadvantaged Tier 1: 55.7% Tier 2: 26% Tier 3: 18.3% Students w/ IEPs Tier 1: 34.8% Tier 2: 31.9% Tier 3: 33.3%	2022 i-Ready ELA Spring Scores ALL Tier 1: 80.5% Tier 2: 13.8% Tier 3: 5.7% English Learners Tier 1: 76.7% Tier 2: 6.7% Tier 3: 16.7% Economically Disadvantaged Tier 1: 74.9% Tier 2: 17.5% Tier 3: 7.7% Students w/ IEPs Tier 1: 50.5% Tier 2: 21.6% Tier 3: 27.8%	2023 i-Ready ELA Spring Scores ALL Tier 1: 78.8% Tier 2: 13.2% Tier 3: 7.9% English Learners Tier 1: 47.4% Tier 2: 36.8% Tier 3: 15.8% Economically Disadvantaged Tier 1: 73.4% Tier 2: 16.8% Tier 3: 9.8% Students with IEPs Tier 1: 49.3% Tier 2: 17.8% Tier 3: 32.9%		Decrease Tier III percentage by 2% each year
i-Ready Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready Math Fall Scores ALL Tier 1: 52.6% Tier 2: 34.4%% Tier 3: 13%	2022 i-Ready Math Spring Scores ALL Tier 1: 74.2% Tier 2: 17.7% Tier 3: 8.1%	2023 i-Ready Math Spring Scores ALL Tier 1: 72.6% Tier 2: 18.3% Tier 3: 9.1%		Decrease Tier III percentage by 2% each year

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	English Learners Tier 1: 36.4% Tier 2: 45.5% Tier 3: 18.2% Economically Disadvantaged Tier 1: 40.6% Tier 2: 38.1% Tier 3: 21.3% Students w/ IEPs Tier 1: 31.9% Tier 2: 26.4% Tier 3: 41.7%	English Learners Tier 1: 63.3% Tier 2: 30% Tier 3: 6.7% Economically Disadvantaged Tier 1: 68.5% Tier 2: 20.8% Tier 3: 10.7% Students w/ IEPs Tier 1: 48% Tier 2: 18.4% Tier 3: 33.7%	English Learners Tier 1: 68.4% Tier 2: 21.1% Tier 3: 10.5% Economically Disadvantaged Tier 1: 68% Tier 2: 20.9% Tier 3: 11% Students with IEPs Tier 1: 37.5% Tier 2: 23.6% Tier 3: 38.9%		
Increase ELPAC levels annually	A baseline will be developed from 2021-22 Summative ELPAC data.	Summative ELPAC results will be published by the state in the summer or fall of 2022.	Summative ELPAC results will be published by the state in the summer or fall of 2023.		Increase ELPAC proficiency by 2% each year.
State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with 2021 local indicator outcomes.	Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.	Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.		Excel Academy will maintain implementation and sustainability of the State Standards against the CDE State Standards Reflection Tool.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.	Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics, Next Generation Science Standards, and history - social science.		
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach		Maintain 100% of teachers are appropriately credentialed for the courses they teach
State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials		Excel Academy will maintain the availability of online, textbook, and teacher created curriculum to meet the individual needs of our students

Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Achievement	1.1 Excel Academy will increase the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in language arts and mathematics through a database system that collects individual formative and summative data. Data collection and analysis includes statewide and internal assessments as measured by the Dashboard and accountability systems.		No
1.2	Student Monitoring	1.2 Monitor low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments to review student learner outcomes and ensure academic success as well as social and emotional wellness, or refer to the RTI, SST, or IEP team. Offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.		Yes
1.3	Broad Course of Study	1.3. All students have access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels assisting students in completing standards-aligned content. • Online courses, credit recovery, core programs • Supplemental curriculum and materials supporting Common Core Standards • Extended School year • Curriculum aligned to Common Core • English Language Development (ELD) curriculum	$11,849,528.00	No
1.4	Professional Development	1.4 Professional development opportunities for teachers and administrators to equip them with information and resources to better serve students and parents, for example, tools for goal setting and	$96,360.00	No

Action #	Title	Description	Total Funds	Contributing
		curriculum pacing, identifying, supporting, and monitoring students in the "What I Need" (WIN) and English Language Development (ELD) program. Professional development through organizations such as CSSA (California Charter School Association), CSDC (Charter School Development Center) and APLUS+.		
1.5	Parent Training	1.5 Provide parent training, learning opportunities, and workshops on a variety of topics, for example, explaining the EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and ToR parent training.		Yes
1.6	Grade Level Curriculum and Instruction	1.6 Students will be provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.		No
1.7	Student Monitoring and Support	1.7 Identify, support, and monitor students performing one or more years below grade level through the "What I Need" (WIN) intervention program. Students are required to participate in weekly intervention programs that are monitored by the credentialed ToR (Teacher of Record). Students who are performing below grade level on the fall i-Ready assessments will be required to take the mid-year i-Ready assessment(s).	$60,910.00	Yes
1.8	Needs Assessment and Data Analysis	1.8 Use data analysis and historical tracking of performance on internal and state testing to drive our policies, curriculum, and program decisions.	$9,600.00	No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 1 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness of 1.1: Excel Academy increased the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in English language arts and mathematics.
Effectiveness of 1.2: Excel Academy monitored low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on local assessments to review student learner outcomes and ensure academic success. In addition, Excel Academy successfully implemented and offered programs to promote academic growth as well as social-emotional learning (SEL) and awareness and character building. Students attended the offered sessions and connected with their peers.
Effectiveness of 1.3: All students were provided access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels and were assisted, supported, and guided in completing standards-aligned content by their assigned Teacher of Record (ToR).
Effectiveness of 1.4: The staff has attended professional development throughout the year to provide best practices and services to serve students and parents. Students and parents are provided with the necessary information, resources, and support to meet the individual needs of the student.
Effectiveness of 1.5: Parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and ToR parent training were provided to all parents.
Effectiveness of 1.6: Students were provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.
Effectiveness of 1.7: Students performing one or more years below grade level through the What I Need (WIN) intervention program were monitored throughout the school year and provided with individualized support. Students were required to participate in weekly intervention programs that are monitored by the credentialed ToR. Students who were performing below grade level on the fall i-Ready assessments were required to take the mid-year i-Ready assessment(s).
Effectiveness of 1.8: Excel Academy has analyzed and tracked the historical i-Ready data to drive our policies, curriculum, and program decisions. The results have influenced the decision to target specific students who need live instruction and additional curriculum and

resources to meet targeted goals. The effectiveness of 1.8 relates to the effectiveness of 1.7 because this targeted analysis provided the intervention department with the data to identify students who were performing below grade level and who needed the additional support. Once the CAASPP data is collected from 2023, the data will be analyzed and the staff will determine the domains that need to be targeted within ELA and math across specific grade levels.

Impact on Student Learning: Students have benefited academically from the increase of support provided by EACS teachers and intervention teams. They have observed an increase in student performance on the i-Ready local assessment, strong CAASPP baseline results, and graduation rates. They have also observed an increase in student participation in interventions and services to support academic achievement.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
2	We will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.

An explanation of why the LEA has developed this goal.

Maintenance Goal:
We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal and actions/services are focused on student, family, and teacher engagement and connectedness to attain a high average daily attendance.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Maintain or decrease Chronic Absenteeism rate of .01%	A baseline will be developed from 2020-21 data	Cumulative Enrollment: 1189, Chronic Absenteeism Count: 6, Chronic Absenteeism Rate: 0.5%	Cumulative Enrollment: 1048, Chronic Absenteeism Count: 14, Chronic Absenteeism Rate: 1.0%		Maintain an Absenteeism Rate of .01% or less
Strive for 0% Expulsion Rate each year	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate		Maintain 0% Expulsion Rate
Strive for 0% Suspension Rate each year	0% Suspension Rate	0% Suspension Rate	0% Suspension Rate		Maintain 0% Suspension Rate

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach		Maintain 100% of teachers are appropriately credentialed for the courses they teach.

Actions

Action #	Title	Description	Total Funds	Contributing
2.1	School Climate and Student Engagement	2.1 Focus on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides.	$52,202.00	No
2.2	Certificated and Classified Salaries and Benefits	2.2 Recruit and retain highly qualified multiple and single-subject teachers and classified staff, maintaining appropriate assignments and remaining competitive with salary and benefits.	$161,382.00	No
2.3	Educational Partner Communication	2.3 Frequent communication with parents/students to notify them of school events, opportunities, and resources through Beehively, email, the school website, and social media platforms. We will build partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.	$24,241.00	No

Action #	Title	Description	Total Funds	Contributing
2.4	Technology	2.4 Purchase technological devices and provide professional development to promote student engagement and develop 21st Century skills and support access to instruction as needed.	$132,000.00	No
2.5	Professional Development	2.5 Professional development in cultural awareness.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 2 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 2.1: Excel Academy focused on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides. Excel Academy is transparent in terms of making sure that parents and guardians are aware of the policies, procedures, and requirements that are in place.
Effectiveness 2.2: Excel Academy recruited and retained highly qualified multiple and single-subject teachers and classified staff, and was able to maintain appropriate assignments and competitive salaries and benefits.
Effectiveness 2.3: Excel Academy provided frequent communication with parents/guardians/students by notifying them of school events, opportunities, and resources through our main communication platform called Beehively, emails, the school website, and social media platforms. Excel Academy built partnerships for student outcomes by sending notification of surveys, parent informational meetings (i.e. ELAC, SSC, and PAC), and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.
Effectiveness 2.4: Excel Academy focused on purchasing technological devices and provided professional development to promote student engagement, support, and access to instruction as needed.

Effectiveness 2.5: Excel Academy focused on providing cultural awareness by inviting students and parents to share about their cultures and traditions during ELAC and SSC meetings which increased meeting attendance and helped to foster cultural awareness.

Impact on Student Learning: There has been an increase in student attendance, in addition to an increase of student participation in SEL lessons, ELD Live, and WIN intervention classes. Attendance and the interventions in place supported progress in both ELA and mathematics as indicated by internal data results.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
3	We will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.

An explanation of why the LEA has developed this goal.

Maintenance Goal:
Establishing connections and partnerships in education with our students and parents correlates with students attending school more regularly, earning higher grades, and graduating from high school. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2020-2021 Maintain or increase by 2%	Year 1 Outcome - 2021-2022 220 Responses from Educational Partners There were more responses that impacted the overall percentages. With a 96% and 98% approval rate, Excel Academy is excelling in all areas mentioned below.	Year 2 Outcome - 2022-2023 304 Responses from Educational Partners There were more responses that impacted the overall percentages. Excel Academy is excelling in all areas mentioned below.		Maintain or increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 6: Overall Satisfaction Rate Survey Results Maintain or increase by 2% each year	Overall Satisfaction Report: Based on 66 responses from parents/guardians 97.6% of survey respondents agree that the school has supported students attaining their academic goals. 98.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.	Overall Satisfaction Report: Based on 220 responses from parents/guardians 96.4% of survey respondents agree that the school has supported students attaining their academic goals. 98.2% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.2% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.	Overall Satisfaction Report: Based on 304 responses from parents/guardians 95.7% of survey respondents agree that the school has supported students attaining their academic goals. 96.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. 98.4% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.		Maintain or increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Safety Plan Review and Training	Annual Review/Updates and Training Dates	The school safety plan was last reviewed and updated with staff in March of 2022.	The school safety plan was last reviewed and updated with staff in March of 2023.		Annual Review and Training Date

Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Educational Partner Engagement	3.1 We will seek parent input and assess our level of educational partner engagement through parent participation in LP, ELAC, SSC, and PAC meetings, surveys, and Student Council, SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have opportunities for participation and input.		No
3.2	Educational Partner Partnerships	3.2 We will engage our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success.	$414,540.00	Yes
3.3	School Climate	3.3 We will build relationships by ensuring that all parents, students, and teachers feel that our schools are providing a safe, positive, inclusive, and welcoming learning environment.	$65,748.00	No
3.4	Student Services	3.4 Properly vet all newly hired Content and Community Providers to ensure standards alignment and safety for our students.	$61,286.00	No

Action #	Title	Description	Total Funds	Contributing
3.5	School Climate and School Safety	3.5 The charter will continue to maintain a safe learning environment for all students by training the teachers and staff on school-wide safety plans.		No
3.6	Communication and Translation Services	3.6 Notices, reports, statements, or records sent to a student, parent, or guardian will be translated as needed. Documents, records, and statements will be sent upon request by clerical staff.	$6,308.00	Yes
3.7	School Operating Services	3.7 Operations of the charter are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 3 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 3.1: Excel Academy sought out parent input and assessed our level of educational partner engagement through parent participation in Learning Period (LP), ELAC, SSC, and PAC meetings, surveys, Student Council, and SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have had opportunities for participation and input.
Effectiveness 3.2: Excel Academy engaged our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success. EACS built partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely

manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.
Effectiveness 3.3: Based on the survey results and stakeholder feedback, Excel Academy successfully built relationships by ensuring that all parents, students, and teachers felt that our school provided a safe, positive, inclusive, and welcoming learning environment.
Effectiveness 3.4: Excel Academy properly vetted all newly hired Content and Community Providers to ensure standards alignment and safety for our students were met at all times.
Effectiveness 3.5: Excel Academy maintains a safe learning environment for all students by training the teachers and staff on school-wide safety plans. The school-wide safety plans are updated as deemed necessary and appropriate and shared with stakeholders to provide transparency and accountability. The safety plan may be viewed upon request. The school safety plan ensures emergency preparedness at learning period meetings, test sites, field trips, staff meetings, and at the school office. It also encompasses required trainings and school expectations in regards to a mandated reporter, sexual harassment, blood borne pathogens, and active shooters. The expectations of conduct for students, parents, guardians, and staff, bullying and hate crime reporting are also included.
Effectiveness 3.6: Excel Academy notices, reports, statements, or records sent to a student, parent, or guardian were translated as needed and upon request. Documents, records, and statements were sent upon request by clerical staff.
Effectiveness 3.7: Operations of Excel Academy are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.

Impact on Student Learning: Increase in participation on the LCAP/WASC feedback survey for all educational partners. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships. EACS recognizes a continued need to increase parent participation in SSC, ELAC and PAC meetings.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Goals and Actions

Goal

Goal #	Description
4	We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all educational partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.

An explanation of why the LEA has developed this goal.

Broad Goal:
With a focus on supporting our students to achieve their goal of high school graduation and college and career preparedness, the goal and actions/services focuses on monitoring each student's progress toward graduation. The continual monitoring of student data to identify struggling students and interventions is important to the success of our students staying on-track with course completion and on course to graduation. Graduation rate, college/career preparedness, and CTE participation are all metrics we monitor to ensure students are on track to graduate and to achieve their post-graduation goals.

Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Graduation Rate Dropout Rate	Develop a baseline from 2020-21 data.	2020-21: 89.7% Graduation Rate 2020-21: 4.8% Dropout Rate	2021-22: 87.2%Graduation Rate 2021-22: Dropout Rate		Increase the graduation rate by 2%
Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU prepared	2020-21: Number of Students participating in CTE: 27	2021-22: Number of Students participating in CTE: 9		Increase the % of College/Career Prepared students by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Access to a Broad Curriculum: College/Career Prepared Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	2019-20 Graduates completed all courses for UC/CSU Admission: 0	2020-21: Students enrolled in UC/CSU required courses for admission: 49.03% Completed All Courses Required for UC/CSU Admission: 0	2021-22: Students enrolled in UC/CSU required courses for admission: 84 Completed All Courses Required for UC/CSU Admission: 1		Increase the A-G course participation and completion annually by 2% to increase the College/Career Prepared Rate

Actions

Action #	Title	Description	Total Funds	Contributing
4.1	College and Career Readiness and Career Technical Education	4.1 Consistent with California College and Career Indicators, develop a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals; continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.	$16,000.00	No
4.2	High School Graduation	4.2 Students transitioning from middle to high school will be monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.	$208,431.00	No
4.3	High School Curriculum and Instruction	4.3 Provide high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.	$625,124.00	No

Action #	Title	Description	Total Funds	Contributing
4.4	Testing	4.4 Ensure all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities.	$148,970.00	Yes
4.5	Testing	4.5 Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.		Yes
4.6	A-G and Career Technical Education Courses	4.6 Expand our A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.	$31,730.00	No
4.7	Needs Assessment - Data Analysis	4.7 Analyze 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Provide targeted interventions and resources to students identified as needing additional support.		No

Goal Analysis [2022-23]

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 4 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective the specific actions were in making progress toward the goal.

Effectiveness 4.1: Consistent with California College and Career Indicators, Excel Academy has developed a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals, and continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.
Effectiveness 4.2: Students transitioning from middle to high school are monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.
Effectiveness 4.3: Excel Academy provides high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Excel Academy works to review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.
Effectiveness 4.4: Excel Academy ensures all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities. Grade level test prep packets in ELA and math, the teacher led performance task prep sessions, and practice tests are designed to assist students in preparation for testing.
Effectiveness 4.5: Excel Academy covers the Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.
Effectiveness 4.6: Excel Academy is working to expand A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.
Effectiveness 4.7: Excel Academy analyzes 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Excel Academy provides targeted interventions and resources to students identified as needing additional support.

Impact on Student Learning: 84 students enrolled in UC/CSU required courses for admission. Excel Academy removed barriers such as Advanced Placement exam costs for low income and foster-youth students experiencing financial hardship, and observed greater student interest in Advanced Placement (AP), CTE, and A-G courses. The continued goal is to increase enrollment in these courses.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2023-24]

Projected LCFF Supplemental and/or Concentration Grants	Projected Additional LCFF Concentration Grant (15 percent)
772,374	0

Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
6.98%	0.00%	$0.00	6.98%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

Required Descriptions

For each action being provided to an entire school, or across the entire school district or county office of education (COE), an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

As provided in the Academic Achievement metrics sections, the ELA i-Ready Diagnostic results demonstrate that:
2023 i-Ready ELA Spring Scores

ALL

Tier 1: 78.8%

Tier 2: 13.2%

Tier 3: 7.9%

English Learners

Tier 1: 47.4%

Tier 2: 36.8%

Tier 3: 15.8%

Economically Disadvantaged
Tier 1: 73.4%
Tier 2: 16.8%
Tier 3: 9.8%

Students with IEPs
Tier 1: 49.3%
Tier 2: 17.8%
Tier 3: 32.9%

As provided in the Academic Achievement metrics sections, the math i-Ready Diagnostic results demonstrate that:
2023 i-Ready Math Spring Scores
ALL
Tier 1: 72.6%
Tier 2: 18.3%
Tier 3: 9.1%

English Learners
Tier 1: 68.4%
Tier 2: 21.1%
Tier 3: 10.5%

Economically Disadvantaged

Tier 1: 68%

Tier 2: 20.9%

Tier 3: 11%

Students with IEPs

Tier 1: 37.5%

Tier 2: 23.6%

Tier 3: 38.9%

How the action(s) intend to meet the needs of students served by the action:

To address these needs in reference to the data, Excel Academy Charter School is focused on increasing the quality and quantity of services by actively using data systems to engage in in-depth analysis of student records, local and state assessment data to accurately assess student progress and develop appropriate interventions and accelerations to support Low Income pupils, Foster Youth, English Learners, and Students With Disabilities to support academic success or refer to the RTI, SST or IEP team.

Excel Academy Charter School's LCAP is focused on providing services and support for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) with the use of supplemental funding that is directed toward unduplicated students to increase and improve services for students who are low income, English Learners, foster youth, and/or homeless. Through educational partner collaboration and input, and the review of our local assessments, data was analyzed to address specific identified student needs and learning gaps. Actions and services were identified to determine the appropriate and effective use of funds to meet the needs and improve the outcomes for all students.

Goal 1 focuses on providing quality curricula to students and using assessments in reading and math to ensure they are meeting the state standards. Action 1.4 focuses on improving the quality of services through relevant and ongoing professional development that addresses topics such as goal setting, creating pacing guides and best practices for supporting high school students. This action is important for the success of all students, but is particularly important to the achievement of English Learners, foster youth, low-income students, and students with disabilities (SWDs). Action 1.5 focuses on improving services in quality by providing parent training and workshops to equip parents in all aspects of education, including expectations and requirements, choosing a standards-based curriculum, and how to locate school-sponsored field trips and approved community partners to help enrich the learning experience. ELAC meetings are held regularly to support parents in understanding the ELD (English Language Development) curriculum, accessing resources, and ensuring they are informed about the reclassification process. This is effective in meeting the needs of these subgroups because when parents are engaged and informed, they are more likely to take advantage of the resources offered and provide valuable input which leads to improved services for their

students. Action 1.7 focuses on monitoring and supporting students in the What I Need (WIN) program. Teachers receive updated training each year and monitor students in the program weekly. This action benefits our underrepresented students because if they are behind grade level they receive personalized intervention lessons to fill in learning gaps and support progress in their grade-level curriculum. This ensures that these students receive individualized attention and do not fall behind.

Goal 3 targets community-building among all of our educational partners. To best support student growth and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs), we strive to foster engagement, involvement, and satisfaction so that all educational partners have input in school policy and program decisions. Action 3.6 ensures that important materials, documents, and conversations are translated for our EL students and their families. This helps cultivate a sense of collaboration and guards against confusion and misunderstanding.

Our actions and services in Goal 4 increase services by monitoring students as they transition into high school and ensuring that they stay on course with their 4-Year Plan. Action 4.4 ensures that all students, and especially our English Learners, students with disabilities (SWD), foster youth and low-income students have access to test preparation materials to support student achievement on the CAASPP and i-Ready assessments. This results in higher achievement for all students. Action 4.5 is in place to make sure that foster youth and low income students have the opportunity to take AP examinations regardless of their financial status. This is effective because it is an attempt to remove any barriers low income students might have to college and career readiness.

All of our goals and actions were created with all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) in mind. It is our deepest desire that each of these student groups would receive the attention and support needed to ensure their emotional and academic success. We are confident these actions will be effective in helping our school meet the goals set for these student groups because our data supports that clear communication with families, ongoing teacher communication, encouragement and support, and access to academic intervention have a significant impact in increasing student engagement and achievement. With the help of staff, teacher and parent feedback, we have been able to identify the actions that will be most effective in closing learning gaps and making certain that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) feel connected to their school and its personnel.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Services for our low-income, English Learners, and foster youth are targeted interventions that were identified through a collaborative effort with the school's Executive Director, Director of Assessment and Accountability, Assistant Director of Intervention, High School Principal, and High School Counselors. The goals and actions in the LCAP are focused on increasing services and improving the quality of the academic

support to improve student performance, educational partner engagement, and the level of college and career readiness of our student groups. Through a collaborative effort, the school leadership team, taking into account the feedback provided from all educational partners, identified the next steps to growth towards each of our goals. We expect to see improvement in student engagement and achievement as reflected in i-Ready and CAASPP test scores, and an increase in our graduation and college and career readiness rate.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

Staff-to-student ratios by type of school and concentration of unduplicated students	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	N/A	N/A
Staff-to-student ratio of certificated staff providing direct services to students	N/A	N/A

2023-24 Total Expenditures Table

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	$13,656,560.00	$246,890.00		$60,910.00	$13,964,360.00	$8,596,553.00	$5,367,807.00

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Achievement	All					
1	1.2	Student Monitoring	English Learners Foster Youth Low Income					
1	1.3	Broad Course of Study	All	$11,849,528.00				$11,849,528.00
1	1.4	Professional Development	All	$13,200.00	$83,160.00			$96,360.00
1	1.5	Parent Training	English Learners					
1	1.6	Grade Level Curriculum and Instruction	All					
1	1.7	Student Monitoring and Support	English Learners Foster Youth Low Income				$60,910.00	$60,910.00
1	1.8	Needs Assessment and Data Analysis	All	$9,600.00				$9,600.00
2	2.1	School Climate and Student Engagement	All	$52,202.00				$52,202.00
2	2.2	Certificated and Classified Salaries and Benefits	All	$161,382.00				$161,382.00
2	2.3	Educational Partner Communication	All	$24,241.00				$24,241.00
2	2.4	Technology	All		$132,000.00			$132,000.00
2	2.5	Professional Development	All					

Goal	Action #	Action Title	Student Group(s)	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
3	3.1	Educational Partner Engagement	All					
3	3.2	Educational Partner Partnerships	English Learners Foster Youth Low Income	$414,540.00				$414,540.00
3	3.3	School Climate	All	$65,748.00				$65,748.00
3	3.4	Student Services	All	$61,286.00				$61,286.00
3	3.5	School Climate and School Safety	All					
3	3.6	Communication and Translation Services	English Learners	$6,308.00				$6,308.00
3	3.7	School Operating Services	All					
4	4.1	College and Career Readiness and Career Technical Education	All	$16,000.00				$16,000.00
4	4.2	High School Graduation	All	$208,431.00				$208,431.00
4	4.3	High School Curriculum and Instruction	All	$625,124.00				$625,124.00
4	4.4	Testing	English Learners Foster Youth Low Income	$148,970.00				$148,970.00
4	4.5	Testing	Foster Youth Low Income					
4	4.6	A-G and Career Technical Education Courses	All		$31,730.00			$31,730.00
4	4.7	Needs Assessment - Data Analysis	All					

2023-24 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
11,069,130	772,374	6.98%	0.00%	6.98%	$569,818.00	0.00%	5.15 %	**Total:**	$569,818.00
								LEA-wide Total:	$569,818.00
								Limited Total:	$0.00
								Schoolwide Total:	$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	**1.2**	Student Monitoring	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		
1	**1.4**	Professional Development				All Schools	$13,200.00	
1	**1.5**	Parent Training	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners	All Schools		
1	**1.7**	Student Monitoring and Support	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		
3	**3.2**	Educational Partner Partnerships	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$414,540.00	
3	**3.6**	Communication and Translation Services	Yes	LEA-wide	English Learners	All Schools	$6,308.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
4	4.4	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	$148,970.00	
4	4.5	Testing	Yes	LEA-wide	Foster Youth Low Income	All Schools		

2022-23 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	$10,607,675.00	$0.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	**1.1**	Student Achievement	No		
1	**1.2**	Student Monitoring	Yes		
1	**1.3**	Broad Course of Study	No	$5,453,947.00	
1	**1.4**	Professional Development	No	$59,972.00	
1	**1.5**	Parent Training	Yes		
1	**1.6**	Grade Level Curriculum and Instruction	No		
1	**1.7**	Student Monitoring and Support	Yes	$334,699.00	
1	**1.8**	Needs Assessment and Data Analysis	No	$26,450.00	
2	**2.1**	School Climate and Student Engagement	No	$47,390.00	
2	**2.2**	Certificated and Classified Salaries and Benefits	No	$4,221,353.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.3	Educational Partner Communication	No	$5,607.00	
2	2.4	Technology	No	$54,370.00	
2	2.5	Professional Development	No		
3	3.1	Educational Partner Engagement	No		
3	3.2	Educational Partner Partnerships	Yes	$122,315.00	
3	3.3	School Climate	No	$10,000.00	
3	3.4	Student Services	No	$52,000.00	
3	3.5	School Climate and School Safety	No		
3	3.6	Communication and Translation Services	Yes	$7,500.00	
3	3.7	School Operating Services	No		
4	4.1	College and Career Readiness and Career Technical Education	No	$16,000.00	
4	4.2	High School Graduation	No	$173,572.00	

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	**4.3**	High School Curriculum and Instruction	No		
4	**4.4**	Testing	Yes	$22,500.00	
4	**4.5**	Testing	Yes		
4	**4.6**	A-G and Career Technical Education Courses	No		
4	**4.7**	Needs Assessment - Data Analysis	No		

2022-23 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
	$324,699.00	$0.00	$0.00	0.00%	0.00%	0.00%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
1	1.2	Student Monitoring	Yes				
1	1.5	Parent Training	Yes				
1	1.7	Student Monitoring and Support	Yes	$294,699.00			
3	3.2	Educational Partner Partnerships	Yes				
3	3.6	Communication and Translation Services	Yes	$7,500.00			
4	4.4	Testing	Yes	$22,500.00			
4	4.5	Testing	Yes				

2022-23 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
		0	0.00%	$0.00	0.00%	0.00%	$0.00	0.00%

Instructions

Plan Summary

Engaging Educational Partners

Goals and Actions

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at lcff@cde.ca.gov.

Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning (California *Education Code* [*EC*] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.

- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (*EC* Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.

- **Accountability and Compliance:** The LCAP serves an important accountability function because aspects of the LCAP template require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:

    - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (*EC* Section 52064[b][4-6]).

    - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (*EC* sections 52064[b][1] and [2]).

    - Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which should: (a) reflect comprehensive strategic planning (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2021–22, 2022–23, and 2023–24 school years reflects statutory changes made through Assembly Bill 1840 (Committee on Budget), Chapter 243, Statutes of 2018. These statutory changes enhance transparency regarding expenditures on actions included in the LCAP, including actions that contribute to meeting the requirement to increase or improve services for foster youth, English learners, and low-income students, and to streamline the information presented within the LCAP to make adopted LCAPs more accessible for educational partners and the public.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

> Given present performance across the state priorities and on indicators in the California School Dashboard (Dashboard), how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions that the LEA believes, based on input gathered from educational partners, research, and experience, will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP itself. Additionally, information is included at the beginning of each section emphasizing the purpose that each section serves.

Plan Summary

Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to provide a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included in the subsequent sections of the LCAP.

Requirements and Instructions

General Information – Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA. For example, information about an LEA in terms of geography, enrollment, or employment, the number and size of specific schools, recent community challenges, and other such information as an LEA wishes to include can enable a reader to more fully understand an LEA's LCAP.

Reflections: Successes – Based on a review of performance on the state indicators and local performance indicators included in the Dashboard, progress toward LCAP goals, local self-assessment tools, input from educational partners, and any other information, what progress is the LEA most proud of and how does the LEA plan to maintain or build upon that success? This may include identifying specific examples of how past increases or improvements in services for foster youth, English learners, and low-income students have led to improved performance for these students.

Reflections: Identified Need – Referring to the Dashboard, identify: (a) any state indicator for which overall performance was in the "Red" or "Orange" performance category or any local indicator where the LEA received a "Not Met" or "Not Met for Two or More Years" rating AND (b) any state indicator for which performance for any student group was two or more performance levels below the "all student*"* performance. What steps is the LEA planning to take to address these areas of low performance and performance gaps? An LEA that is required to include a goal to address one or more consistently low-performing student groups or low-performing schools must identify that it is required to include this goal and must also identify the applicable student group(s) and/or school(s). Other needs may be identified using locally collected data including data collected to inform the self-reflection tools and reporting local indicators on the Dashboard.

LCAP Highlights – Identify and briefly summarize the key features of this year's LCAP.

Comprehensive Support and Improvement – An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

- **Schools Identified**: Identify the schools within the LEA that have been identified for CSI.
- **Support for Identified Schools**: Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.
- **Monitoring and Evaluating Effectiveness**: Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

Engaging Educational Partners

Purpose

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

Statute and regulations specify the educational partners that school districts and COEs must consult when developing the LCAP: teachers, principals, administrators, other school personnel, local bargaining units of the LEA, parents, and students. Before adopting the LCAP, school districts and COEs must share it with the Parent Advisory Committee and, if applicable, to its English Learner Parent Advisory Committee. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

Statute requires charter schools to consult with teachers, principals, administrators, other school personnel, parents, and students in developing the LCAP. The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals and actions.

Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the following web page of the CDE's website: https://www.cde.ca.gov/re/lc/.

Requirements and Instructions

Below is an excerpt from the 2018–19 *Guide for Annual Audits of K–12 Local Education Agencies and State Compliance Reporting*, which is provided to highlight the legal requirements for engagement of educational partners in the LCAP development process:

Local Control and Accountability Plan:
For county offices of education and school districts only, verify the LEA:

a) Presented the local control and accountability plan to the parent advisory committee in accordance with Education Code section 52062(a)(1) or 52068(a)(1), as appropriate.

b) If applicable, presented the local control and accountability plan to the English learner parent advisory committee, in accordance with Education Code section 52062(a)(2) or 52068(a)(2), as appropriate.

c) Notified members of the public of the opportunity to submit comments regarding specific actions and expenditures proposed to be included in the local control and accountability plan in accordance with Education Code section 52062(a)(3) or 52068(a)(3), as appropriate.

d) Held at least one public hearing in accordance with Education Code section 52062(b)(1) or 52068(b)(1), as appropriate.

e) Adopted the local control and accountability plan in a public meeting in accordance with Education Code section 52062(b)(2) or 52068(b)(2), as appropriate.

Prompt 1: "A summary of the process used to engage educational partners and how this engagement was considered before finalizing the LCAP."

Describe the engagement process used by the LEA to involve educational partners in the development of the LCAP, including, at a minimum, describing how the LEA met its obligation to consult with all statutorily required educational partners as applicable to the type of LEA. A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.

Prompt 2: "A summary of the feedback provided by specific educational partners."

Describe and summarize the feedback provided by specific educational partners. A sufficient response to this prompt will indicate ideas, trends, or inputs that emerged from an analysis of the feedback received from educational partners.

Prompt 3: "A description of the aspects of the LCAP that were influenced by specific input from educational partners."

A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. The response must describe aspects of the LCAP that were influenced by or developed in response to the educational partner feedback described in response to Prompt 2. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP. For the purposes of this prompt, "aspects" of an LCAP that may have been influenced by educational partner input can include, but are not necessarily limited to:

- Inclusion of a goal or decision to pursue a Focus Goal (as described below)
- Inclusion of metrics other than the statutorily required metrics
- Determination of the desired outcome on one or more metrics
- Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
- Inclusion of action(s) or a group of actions
- Elimination of action(s) or group of actions
- Changes to the level of proposed expenditures for one or more actions

- Inclusion of action(s) as contributing to increased or improved services for unduplicated services
- Determination of effectiveness of the specific actions to achieve the goal
- Determination of material differences in expenditures
- Determination of changes made to a goal for the ensuing LCAP year based on the annual update process
- Determination of challenges or successes in the implementation of actions

Goals and Actions

Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal should be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs should consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard in determining whether and how to prioritize its goals within the LCAP.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- Focus Goal: A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.

- Broad Goal: A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.

- Maintenance of Progress Goal: A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

At a minimum, the LCAP must address all LCFF priorities and associated metrics.

Focus Goal(s)
Goal Description: The description provided for a Focus Goal must be specific, measurable, and time bound. An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach. The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA has chosen to prioritize this goal. An explanation must be based on Dashboard data or other locally collected data. LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners. LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

Broad Goal
Goal Description: Describe what the LEA plans to achieve through the actions included in the goal. The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal. The goal description organizes the actions and expected outcomes in a cohesive and consistent manner. A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

Explanation of why the LEA has developed this goal: Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

Maintenance of Progress Goal
Goal Description: Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP. Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP. The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

Explanation of why the LEA has developed this goal: Explain how the actions will sustain the progress exemplified by the related metrics.

Required Goals
In general, LEAs have flexibility in determining what goals to include in the LCAP and what those goals will address; however, beginning with the development of the 2022–23 LCAP, LEAs that meet certain criteria are required to include a specific goal in their LCAP.

Consistently low-performing student group(s) criteria: An LEA is eligible for Differentiated Assistance for three or more consecutive years based on the performance of the same student group or groups in the Dashboard. A list of the LEAs required to include a goal in the LCAP based on student group performance, and the student group(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Consistently low-performing student group(s) goal requirement:** An LEA meeting the consistently low-performing student group(s) criteria must include a goal in its LCAP focused on improving the performance of the student group or groups that led to the LEA's eligibility for Differentiated

Assistance. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, this student group or groups. An LEA required to address multiple student groups is not required to have a goal to address each student group; however, each student group must be specifically addressed in the goal. This requirement may not be met by combining this required goal with another goal.

- **Goal Description:** Describe the outcomes the LEA plans to achieve to address the needs of, and improve outcomes for, the student group or groups that led to the LEA's eligibility for Differentiated Assistance.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the student group(s) that lead to the LEA being required to develop this goal, how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the student group(s), and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes identified in the goal description.

Low-performing school(s) criteria: The following criteria only applies to a school district or COE with two or more schools; it does not apply to a single-school district. A school district or COE has one or more schools that, for two consecutive years, received the two lowest performance levels on all but one of the state indicators for which the school(s) receive performance levels in the Dashboard and the performance of the "All Students" student group for the LEA is at least one performance level higher in all of those indicators. A list of the LEAs required to include a goal in the LCAP based on school performance, and the school(s) that lead to identification, may be found on the CDE's Local Control Funding Formula web page at https://www.cde.ca.gov/fg/aa/lc/.

- **Low-performing school(s) goal requirement:** A school district or COE meeting the low-performing school(s) criteria must include a goal in its LCAP focusing on addressing the disparities in performance between the school(s) and the LEA as a whole. This goal must include metrics, outcomes, actions, and expenditures specific to addressing the needs of, and improving outcomes for, the students enrolled at the low-performing school or schools. An LEA required to address multiple schools is not required to have a goal to address each school; however, each school must be specifically addressed in the goal. This requirement may not be met by combining this goal with another goal.

- **Goal Description:** Describe what outcomes the LEA plans to achieve to address the disparities in performance between the students enrolled at the low-performing school(s) and the students enrolled at the LEA as a whole.

- **Explanation of why the LEA has developed this goal**: Explain why the LEA is required to develop this goal, including identifying the schools(s) that lead to the LEA being required to develop this goal; how the actions and associated metrics included in this goal differ from previous efforts to improve outcomes for the school(s); and why the LEA believes the actions, metrics, and expenditures included in this goal will help achieve the outcomes for students enrolled at the low-performing school or schools identified in the goal description.

Measuring and Reporting Results:
For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes. LEAs are encouraged to identify metrics for specific student groups, as appropriate, including expected outcomes that would reflect narrowing of any existing performance gaps.

Include in the baseline column the most recent data associated with this metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2019 Dashboard for the baseline of a metric only if that data represents the most recent available (e.g., high school graduation rate).

Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS. Because final 2020–21 outcomes on some metrics may not be computable at the time the 2021–24 LCAP is adopted (e.g., graduation rate, suspension rate), the most recent data available may include a point in time calculation taken each year on the same date for comparability purposes.

The baseline data shall remain unchanged throughout the three-year LCAP.

Complete the table as follows:

- **Metric**: Indicate how progress is being measured using a metric.
- **Baseline**: Enter the baseline when completing the LCAP for 2021–22. As described above, the baseline is the most recent data associated with a metric. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 1 Outcome**: When completing the LCAP for 2022–23, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 2 Outcome**: When completing the LCAP for 2023–24, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above.
- **Year 3 Outcome**: When completing the LCAP for 2024–25, enter the most recent data available. Indicate the school year to which the data applies, consistent with the instructions above. The 2024–25 LCAP will be the first year in the next three-year cycle. Completing this column will be part of the Annual Update for that year.
- **Desired Outcome for 2023–24**: When completing the first year of the LCAP, enter the desired outcome for the relevant metric the LEA expects to achieve by the end of the 2023–24 LCAP year.

Timeline for completing the "**Measuring and Reporting Results**" part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2021–22**.	Enter information in this box when completing the LCAP for **2022–23**. Leave blank until then.	Enter information in this box when completing the LCAP for **2023–24**. Leave blank until then.	Enter information in this box when completing the LCAP for **2024–25**. Leave blank until then.	Enter information in this box when completing the LCAP for **2021–22** or when adding a new metric.

The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year as applicable to the type of LEA. To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant self-reflection tool for local indicators within the Dashboard.

Actions: Enter the action number. Provide a short title for the action. This title will also appear in the action tables. Provide a description of the action. Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the summary tables. Indicate whether the action contributes to meeting the increase or improved services requirement as described in the Increased or Improved Services section using a "Y" for Yes or an "N" for No. (**Note:** for each such action offered on an LEA-wide or schoolwide basis, the LEA will need to provide additional information in the Increased or Improved Summary Section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496(b) in the Increased or Improved Services Section of the LCAP).

> ***Actions for English Learners:*** School districts, COEs, and charter schools that have a numerically significant English learner student subgroup must include specific actions in the LCAP related to, at a minimum, the language acquisition programs, as defined in *EC* Section 306, provided to students and professional development activities specific to English learners.
>
> ***Actions for Foster Youth***: School districts, COEs, and charter schools that have a numerically significant Foster Youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to Foster Youth students.

Goal Analysis:

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

- Describe the effectiveness of the specific actions to achieve the articulated goal as measured by the LEA. In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal. When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.

Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA's description in this section must align with the actions included in the Goals and Actions section as contributing.

Requirements and Instructions

Projected LCFF Supplemental and/or Concentration Grants: Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of low income, foster youth, and English learner students.

Projected Additional LCFF Concentration Grant (15 percent): Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

***Projected Percentage to Increase or Improve Services for the Coming School Year*:** Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

LCFF Carryover — Percentage: Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

LCFF Carryover — Dollar: Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero ($0).

Total Percentage to Increase or Improve Services for the Coming School Year: Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEAs percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 *CCR* Section 15496(a)(7).

Required Descriptions:

For each action being provided to an entire school, or across the entire school district or COE, an explanation of (1) how the needs of foster youth, English learners, and low-income students were considered first, and (2) how these actions are effective in meeting the goals for these students.

For each action included in the Goals and Actions section as contributing to the increased or improved services requirement for unduplicated pupils and provided on an LEA-wide or schoolwide basis, the LEA must include an explanation consistent with 5 *CCR* Section 15496(b). For any such actions continued into the 2021–24 LCAP from the 2017–2020 LCAP, the LEA must determine whether or not the action was effective as expected, and this determination must reflect evidence of outcome data or actual implementation to date.

Principally Directed and Effective: An LEA demonstrates how an action is principally directed towards and effective in meeting the LEA's goals for unduplicated students when the LEA explains how:

- It considers the needs, conditions, or circumstances of its unduplicated pupils;
- The action, or aspect(s) of the action (including, for example, its design, content, methods, or location), is based on these considerations; and
- The action is intended to help achieve an expected measurable outcome of the associated goal.

As such, the response provided in this section may rely on a needs assessment of unduplicated students.

Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient. Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increase or improve services standard because enrolling students is not the same as serving students.

For example, if an LEA determines that low-income students have a significantly lower attendance rate than the attendance rate for all students, it might justify LEA-wide or schoolwide actions to address this area of need in the following way:

> After assessing the needs, conditions, and circumstances of our low-income students, we learned that the attendance rate of our low-income students is 7 percent lower than the attendance rate for all students. (Needs, Conditions, Circumstances [Principally Directed])
>
> In order to address this condition of our low-income students, we will develop and implement a new attendance program that is designed to address some of the major causes of absenteeism, including lack of reliable transportation and food, as well as a school climate that does not emphasize the importance of attendance. Goal N, Actions X, Y, and Z provide additional transportation and nutritional resources as well as a districtwide educational campaign on the benefits of high attendance rates. (Contributing Action[s])
>
> These actions are being provided on an LEA-wide basis and we expect/hope that all students with less than a 100 percent attendance rate will benefit. However, because of the significantly lower attendance rate of low-income students, and because the actions meet needs most associated with the chronic stresses and experiences of a socio-economically disadvantaged status, we expect that the attendance rate for our low-income students will increase significantly more than the average attendance rate of all other students. (Measurable Outcomes [Effective In])

COEs and Charter Schools: Describe how actions included as contributing to meeting the increased or improved services requirement on an LEA-wide basis are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above. In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

For School Districts Only:

Actions Provided on an LEA-Wide Basis:

Unduplicated Percentage > 55 percent: For school districts with an unduplicated pupil percentage of 55 percent or more, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities as described above.

Unduplicated Percentage < 55 percent: For school districts with an unduplicated pupil percentage of less than 55 percent, describe how these actions are principally directed to and effective in meeting its goals for unduplicated pupils in the state and any local priorities. Also describe how the actions **are the most effective use of the funds** to meet these goals for its unduplicated pupils. Provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions Provided on a Schoolwide Basis:

School Districts must identify in the description those actions being funded and provided on a schoolwide basis, and include the required description supporting the use of the funds on a schoolwide basis.

For schools with 40 percent or more enrollment of unduplicated pupils: Describe how these actions are principally directed to and effective in meeting its goals for its unduplicated pupils in the state and any local priorities.

For school districts expending funds on a schoolwide basis at a school with less than 40 percent enrollment of unduplicated pupils: Describe how these actions are principally directed to and how the actions are the most effective use of the funds to meet its goals for foster youth, English learners, and low-income students in the state and any local priorities.

A description of how services for foster youth, English learners, and low-income students are being increased or improved by the percentage required.

Consistent with the requirements of 5 *CCR* Section 15496, describe how services provided for unduplicated pupils are increased or improved by at least the percentage calculated as compared to the services provided for all students in the LCAP year. To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are included in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided on an LEA-wide or schoolwide basis or provided on a limited basis to unduplicated students. A limited action is an action that only serves foster youth, English learners, and/or low-income students. This description must address how these action(s) are expected to result in the required proportional increase or improvement in services for unduplicated pupils as compared to the services the LEA provides to all students for the relevant LCAP year.

For any action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage. See the instructions for determining the Planned Percentage of Improved Services for information on calculating the Percentage of Improved Services.

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.

Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.

An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.

In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of full time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.

- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA. The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA. The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

Action Tables

Complete the Data Entry Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Data Entry Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. With the exception of the Data Entry Table, the word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)

- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2022–23 LCAP, 2022–23 will be the coming LCAP Year and 2021–22 will be the current LCAP Year.

Data Entry Table

The Data Entry Table may be included in the LCAP as adopted by the local governing board or governing body, but is not required to be included. In the Data Entry Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year**: Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

  See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF apportionment calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will receive on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 *CCR* Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover —

Percentage. This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.

- **Goal #**: Enter the LCAP Goal number for the action.
- **Action #**: Enter the action's number as indicated in the LCAP Goal.
- **Action Title**: Provide a title of the action.
- **Student Group(s)**: Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services.
- If "Yes" is entered into the Contributing column, then complete the following columns:
    - **Scope**: The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.
    - **Unduplicated Student Group(s)**: Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
    - **Location**: Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate "All Schools." If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter "Specific Schools" or "Specific Grade Spans." Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span**: Enter "ongoing" if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter "1 Year," or "2 Years," or "6 Months."
- **Total Personnel**: Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel**: This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.

- **LCFF Funds**: Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA's total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
    - **Note:** For an action to contribute towards meeting the increased or improved services requirement it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds**: Enter the total amount of Other State Funds utilized to implement this action, if any.
- **Local Funds**: Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds**: Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds**: This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services**: For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.
    - As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

      For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which the LEA estimates would cost $165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of $165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Service for the action.

Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures**: Enter the total estimated actual expenditures to implement this action, if any.

Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

- **Estimated Actual Expenditures for Contributing Actions**: Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).

    - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been $169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of $169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant**: Provide the total amount of LCFF funding the LEA estimates it will receive for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Grant Program and the Home to School Transportation Program, pursuant to 5 *CCR* Section 15496(a)(8).

- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 *CCR* Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

Contributing Actions Table

- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column
- 5. Total Planned Percentage of Improved Services
    - This percentage is the total of the Planned Percentage of Improved Services column
- Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)
    - This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

Contributing Actions Annual Update Table

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- 6. Estimated Actual LCFF Supplemental and Concentration Grants
    - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- 4. Total Planned Contributing Expenditures (LCFF Funds)
    - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)

- 7. Total Estimated Actual Expenditures for Contributing Actions
    - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds)
- Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)
    - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4)
- 5. Total Planned Percentage of Improved Services (%)
    - This amount is the total of the Planned Percentage of Improved Services column
- 8. Total Estimated Actual Percentage of Improved Services (%)
    - This amount is the total of the Estimated Actual Percentage of Improved Services column
- Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)
    - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8)

LCFF Carryover Table

- 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)
    - This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.
- 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)
    - This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).
- 12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)
    - If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

      The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- 13. LCFF Carryover — Percentage (12 divided by 9)
    - This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

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