



Excel Academy (CA)

Regular Meeting of the Board of Directors

Published on September 8, 2023 at 5:49 PM PDT

Date and Time

Thursday September 14, 2023 at 10:20 AM PDT

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: 851 1607 6691

Zoom URL: <https://us06web.zoom.us/j/85116076691>

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.

THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE

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REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY

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Agenda

	Purpose	Presenter	Time
I. Opening Items			10:20 AM
A. Call the Meeting to Order		Board President	1 m
B. Record Attendance		Board President	1 m
Roll Call:			
William Hall, President			
Michael Humphrey, Vice President			
Steve Fraire, Clerk			
Susan Houle, Member			
Larry Alvarado, Member			
II. Pledge of Allegiance			
III. Approve/Adopt Agenda			10:22 AM
A. Agenda	Vote	Board President	1 m
It is recommended the Board of Directors adopt as presented, the agenda for the Regular Board meeting of September 14, 2023.			
Roll Call Vote:			
William Hall			
Michael Humphrey			
Steve Fraire			

	Purpose	Presenter	Time
Susan Houle Larry Alvarado			
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

IV. Approve Minutes 10:23 AM

A. Approve Minutes	Approve Minutes	Board President	1 m
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Minutes of the Regular Board Meeting that was held on June 22, 2023.

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

Approve minutes for Regular Meeting of the Board of Directors on June 22, 2023

B. Approve Minutes	Approve Minutes	William Hall	1 m
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Minutes of the Board Study Session that was held on August 17, 2023.

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

Approve minutes for Board of Directors Study Session on August 17, 2023

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.

	Purpose	Presenter	Time
VI. Adjourn to Closed Session			10:25 AM
A. The Board will consider and may act on any of the Closed Session matters.	Vote	William Hall	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			10:26 AM
A. Closed Session	Discuss	William Hall	12 m
1. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION (Gov. Code Section 54956.9(d)(1)) YL v. The Collaborative Charter Services Organization, et al			
VIII. Reconvene Regular Meeting			10:38 AM
A. Report out any action taken in closed session.	Discuss	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.			

	Purpose	Presenter	Time
X. Correspondence/Proposals/Reports			10:43 AM
A. School Highlights - Presented by Heidi Gasca, Executive Director/CEO	Discuss	Heidi Gasca	8 m
B. Student Achievement Data - Presented by Jenny Craig, Director of Assessment & Accountability	Discuss	Jennifer Craig	7 m
C. Teacher Testimonials	Discuss	Heidi Gasca	10 m

XI. Consent **11:08 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 - June 2023
2. Check Register - July 2023
3. Check Register - August 2023
4. Cash Payments - July 2023
5. Cash Payments - August 2023
6. Approval of Authorization of Signatures for Contracts & Banking
7. Approval of APLUS+ Network Conference 2023
8. Ratification of Bolton Property & Casualty Insurance Renewal

B. Consent - Education Student/Services

1. Approval of the Pali Institute Overnight Science Camp Field Trip
2. Approval of the Washington D.C. Three Night Field Trip
2. Approval of the Excel Academy Charter School English Language Development (ELD) Handbook for Families 2023-2024
3. Ratification of the Special Education Master Contract for External Vendors

C. Consent - Personnel Services

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report
3. Approval of Job Descriptions

	Purpose	Presenter	Time
4.	Approval of Excel Academy Charter School Employee Handbook Revisions 2023-2024		
5.	Approval of Teacher of Record (ToR) Training Manual Revisions 2023-2024		
6.	Approval of Excel Academy Charter School Travel Manual Revisions 2023-2024		

- D. Policy Development** William Hall
- Approval of existing board policies revised, reviewed, and eliminated by staff for the 2023-24 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.

- 1000 Series - Community Relations
- 1025-EA Uniform Complaint Policy

- E. Approve Consent Agenda** Vote William Hall 1 m
- Items in the consent agenda 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. Board Governance **11:09 AM**

- A. Approval of Board of Directors Reappointment and Terms of Office** Vote Heidi Gasca 5 m
- It is recommended the Board approve the Board of Directors Reappointment and Terms of Office for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

- 1. Steve Fraire

2. Susan Houle

Purpose Presenter Time

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

- B. Administer Oath of Office Heidi Gasca 5 m

The Excel Academy Charter School Board of Directors Manual states:

It is a tradition of the Board that, prior to entering office, all Board members take an oath or affirmation.

The following oath may be administered and certified by the Superintendent/CEO/Executive Director and/or the Board President.

- C. Approval of the 2023-2024 Annual Board Evaluation Vote Heidi Gasca 1 m

It is recommended that the Board approve the final Annual Board Evaluation for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XIII. Business/Financial Services 11:20 AM

- A. Approval of Unaudited Actuals for the 2022-2023 School Year Vote Joe Sorrera 8 m

	Purpose	Presenter	Time
<p>It is recommended the Board approve the Unaudited Actuals for the 2022-2023 School Year for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).</p>			

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

- | | | | |
|---|------|-------------|-----|
| <p>B. Approval of 2023-24 Consolidated Application and Reporting System (CARS)</p> | Vote | Joe Sorrera | 3 m |
|---|------|-------------|-----|

Excel Academy Charter School (EACS) submits the Consolidated Application to the California Department of Education (CDE) under the Consolidated Reporting System (CARS). There are two data collections for Consolidated Application each year (winter and spring). The Consolidated Application Spring Data collection is from May 15 through June 30 and has been delayed from August 1 to September 12, 2023.

Data collected in this report includes EACS 2023-24 Application for Funding for Title I, Title II, Title III, and Title IV, Certification of Assurances, Protected Prayer Certification, and LCAP Federal Addendum Certification.

It is recommended the Board of Directors approve the 2023/24 Consolidated Application and Reporting System (CARS) for Excel Academy Charter School, Helendale (#2073), Warner (#2053).

Fiscal Impact: N/A

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XIV. Personnel Services

11:31 AM

	Purpose	Presenter	Time
A.	Approval of 2023-2024 Excel Academy Board of Directors and Executive Director/CEO Goals	Vote Heidi Gasca	5 m

It is recommended that the Board approve the Excel Academy Board of Directors and Executive Director/CEO goals as presented during the study session which was held on August 17, 2023.

Fiscal Impact: N/A

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

B.	Approve 2023-24 Executive Director/CEO Evaluation Process, Timeline, Evaluators, Evaluator Compensation, and Evaluation Template	Vote Heidi Gasca	5 m
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It is recommended that the Board approve the Executive Director/CEO evaluation process that was held during the study session on August 17, 2023, which includes the following:

1. Evaluation Timeline, 2. Evaluation Template, 3. Evaluator Selection, and 4. Evaluator Compensation

Fiscal Impact: \$7,200.00

Warner (#2053) \$5,040.00

Helendale (#2073) \$2,160.00

XV. Calendar

The next scheduled Regular Board Meeting will be held both in person and virtually on October 12, 2023.

XVI. Board Comments

XVII. CEO Comments

	Purpose	Presenter	Time
XVIII. Closing Items			11:41 AM
A. Adjourn Meeting	Vote	William Hall	1 m
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

Approve Minutes

Section: IV. Approve Minutes
Item: A. Approve Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Regular Meeting of the Board of Directors on June 22, 2023

APPROVED



Excel Academy (CA)

Minutes

Regular Meeting of the Board of Directors

Date and Time

Thursday June 22, 2023 at 9:30 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

39251 Camino Las Hoyas
Indio, CA 92203

Zoom Meeting Information:

Dial In: +1 669 444 9171

Meeting ID: 844 2497 6804

Zoom Link: <https://us06web.zoom.us/j/84424976804>

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Directors Present

L. Alvarado, M. Humphrey, S. Fraire (remote), W. Hall

Directors Absent

S. Houle

Guests Present

H. Gasca (remote), L. Hansen (remote)

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 Jun 22, 2023 at 9:47 AM.

B. Record Attendance

II. Approve/Adopt Agenda

A. Agenda

The Agenda for the June 22 meeting will be amended: Closed Session will be removed.

M. Humphrey made a motion to Bill Hall.

S. Fraire seconded the motion.

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

Roll Call

W. Hall Aye

M. Humphrey Aye

Roll Call

S. Fraire Aye
S. Houle Absent
L. Alvarado Aye

III. Approve Minutes

A. Minutes of the Regular Board Meeting held on June 15, 2023

L. Alvarado made a motion to approve the minutes from Regular Meeting of the Board of Directors on 06-15-23.

M. Humphrey seconded the motion.

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

Roll Call

M. Humphrey Aye
W. Hall Aye
S. Fraire Abstain
L. Alvarado Aye
S. Houle Absent

IV. Consent

A. Consent - Business/Financial Services

1. Approval of the Cash Payments - June 2023

B. Consent - Personnel Services

L. Alvarado made a motion to Bill Hall.

M. Humphrey seconded the motion.

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report

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

Roll Call

M. Humphrey Aye
L. Alvarado Aye
S. Houle Absent
S. Fraire Abstain
W. Hall Aye

V. Business/Financial Services

A. Budget Adoption 2023-24

M. Humphrey made a motion to Bill Hall.

L. Alvarado seconded the motion.
The board **VOTED** to approve the motion.

Roll Call

W. Hall	Aye
S. Fraire	Abstain
L. Alvarado	Aye
M. Humphrey	Aye
S. Houle	Absent

B. Approval of Board of Directors Stipend Increase

M. Humphrey made a motion to Bill Hall.
L. Alvarado seconded the motion.
The Board would like to review this annually.
The board **VOTED** to approve the motion.

Roll Call

S. Houle	Absent
M. Humphrey	Aye
L. Alvarado	Aye
S. Fraire	Abstain
W. Hall	Aye

VI. Education/Student Services

A. Approval of the Local Indicators and Local Control & Accountability Plan (LCAP) 2023-24

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

Roll Call

L. Alvarado	Aye
M. Humphrey	Aye
W. Hall	Aye
S. Fraire	Abstain
S. Houle	Absent

VII. Organizational Structure of the Board

A. Approval of the revisions to the Board of Directors Manual

L. Alvarado made a motion to Bill Hall.
M. Humphrey seconded the motion.
The Board, in the future, would like to add a section to the Board Manual to regarding removal of Board members for anything that is inappropriate in terms of behavior that would jeopardize the mission of the organization. The Executive director noted that this

procedure is outlined in the Bylaws, but will be added to the Board Manual as well at the next review.

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

Roll Call

S. Houle	Absent
W. Hall	Aye
M. Humphrey	Aye
L. Alvarado	Aye
S. Fraire	Abstain

VIII. Personnel Services

A. Approval of Employment Agreement for Heidi Gasca, Executive Director/CEO, July 1, 2023 through June 30, 2025

L. Alvarado made a motion to Bill Hall.

M. Humphrey seconded the motion.

The Board believes this contract is well deserved for Heidi's exemplary leadership.

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

Roll Call

W. Hall	Aye
S. Houle	Absent
L. Alvarado	Aye
S. Fraire	Abstain
M. Humphrey	Aye

IX. Comments

A. Board Comments

The Board commended Heidi and the staff for a wonderful job this school year. They believe everything Excel does is top notch. They appreciate how smoothly the Board meetings run.

B. CEO Comments

Heidi remarked on how incredible the year has been, and thanked the Board for their support.

X. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 10:00 AM.

Respectfully Submitted,
W. Hall

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

Coversheet

Approve Minutes

Section: IV. Approve Minutes
Item: B. Approve Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Board of Directors Study Session on August 17, 2023

APPROVED



Excel Academy (CA)

Minutes

Board of Directors Study Session

Date and Time

Thursday August 17, 2023 at 2:45 PM

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: 893 6138 1348

Zoom URL: <https://us06web.zoom.us/j/89361381348>

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Directors Present

L. Alvarado, M. Humphrey, W. Hall

Directors Absent

S. Fraire, S. Houle

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 Aug 17, 2023 at 3:18 PM.

B. Record Attendance

II. Approve/Adopt Agenda

A. Agenda

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

Roll Call

S. Houle Absent
S. Fraire Absent

III. Adjourn To Closed Session

A.

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

L. Alvarado made a motion to Bill Hall.

M. Humphrey seconded the motion.

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

Roll Call

M. Humphrey Aye

S. Houle Absent

S. Fraire Absent

L. Alvarado Aye

W. Hall Aye

IV. Reconvene Regular Meeting

A. Report out any action taken in closed session.

No action was taken.

V. Board Governance

A. Approval of Excel Academy Charter Schools 2023-2024 Board Meeting Calendar Revision

M. Humphrey made a motion to Bill Hall.

L. Alvarado seconded the motion.

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

Roll Call

S. Houle Absent

L. Alvarado Aye

M. Humphrey Aye

S. Fraire Absent

W. Hall Aye

B. Approval of Increased Frequency for the 2023-2024 Board Evaluator Stipend

M. Humphrey made a motion to Bill Hall.

L. Alvarado seconded the motion.

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

Roll Call

W. Hall Aye

S. Houle Absent

M. Humphrey Aye

L. Alvarado Aye

S. Fraire Absent

VI. Personnel

A. Approval of the One-time Bonus for Staff and Rectification of 2021/22 Furlough Days

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

Roll Call

S. Houle	Absent
W. Hall	Aye
S. Fraire	Absent
L. Alvarado	Aye
M. Humphrey	Aye

VII. Oral Presentations

A. Annual Board of Directors Evaluation

The Board of Directors went through their evaluation and commented on areas of improvement and areas of strength.

The main areas of improvement were: proficiency in technology, onboarding of new Board Members, and the CEO succession plan.

B. Annual Executive Director/CEO Goals and Evaluation Planning

The Executive Director reviewed her evaluation timeline, her three goals based on the CPSEL standards, her evaluation template (with linked evidence), and the evaluator selection of a two-person committee.

VIII. 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 4:01 PM.

Respectfully Submitted,
W. Hall

FOR MORE INFORMATION
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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: EACS August 2023 Board Update.pdf

EXCEL ACADEMY AUGUST HIGHLIGHTS

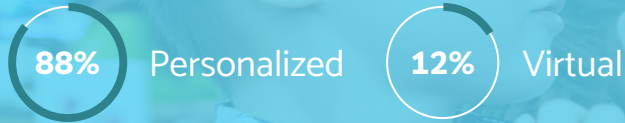
September 14, 2023

EXCEL ACADEMY



Enrollment Data

Academic Path

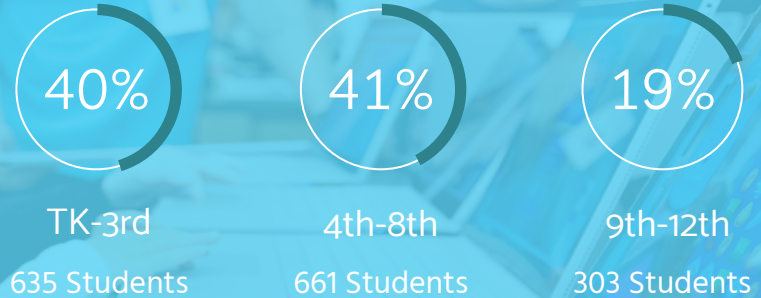


Student Retention - 80%



#

Student Count: 1,601



Warner:
1000 Students

Helendale:
601 Students



EACS' Theme for 2023/24:



All Staff PD Kickoff

E Empowerment

A Accountability

G Grit

L Life-long Learner

E Empathy

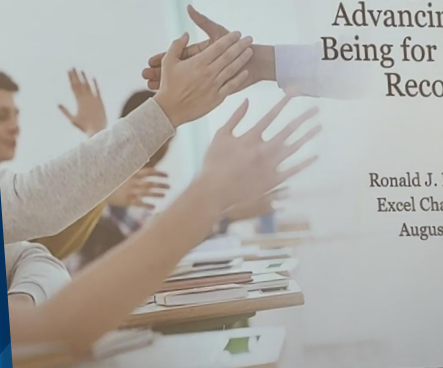
S Self Awareness

School Goals

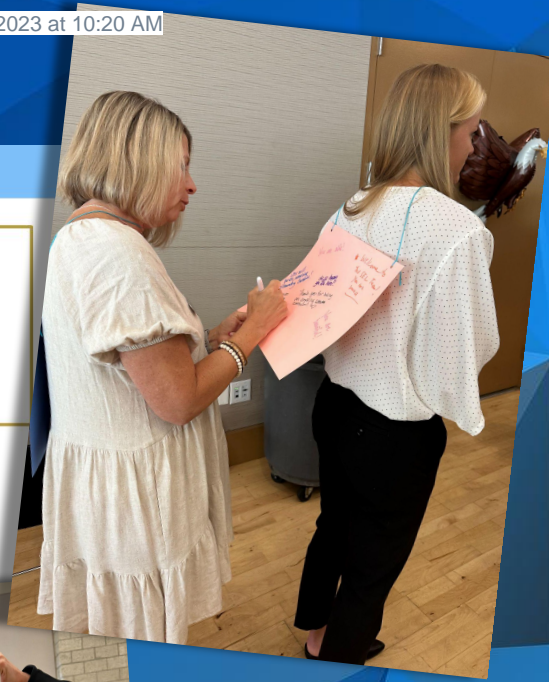
1. Sustainable Growth: Sustainable growth through strategic planning and optimizing resources in relationship to our budget. New student recruitment initiatives through community outreach, relationship building, demographic research and marketing through diverse mixed media.
2. Retention: Sustainably retaining students through high academic expectations, intervention, innovation, quality programs and collaboration. Staff retention through improvements and initiatives that increase positive culture, oversight, accountability, professional development and support.
3. Quality Programs: Offer students innovative personalized programs that offer flexibility, leadership and independent learning. Develop and empower individual teams to deliver Diverse programs and offering CTE various paths to success, flex based independence, integrity, accountability and compliance.
4. Professional Development: Growing, enhancing and developing skills in our staff. Defining and demonstrating roles and responsibilities, identifying strengths and weaknesses. Providing methods of support including training and access to materials to enhance performance. Emphasizing how teamwork and using individual strengths contribute to success.

Safety and Belonging First: Advancing Well-Being for LGBTQ+ Youth

Ronald J. P...
Excel Char...
August



<p>P</p> <p>Power Imbalance A bully will hold real or perceived power over another (age, size, group)</p>	<p>A</p> <p>Aggressive Behavior May result in emotional, physical, and/or relational aggression.</p>
<p>I</p> <p>Intentional Behavior demonstrates that it took forethought or planning</p>	<p>N</p> <p>Numerous Times This is a repeating behavior.</p>



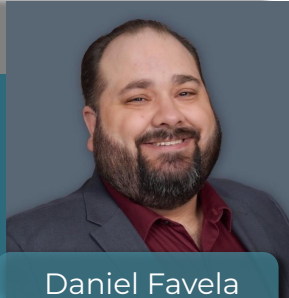
Safety & Belonging First Presentation



“
LGBTQ+ youth were more likely to attend non-traditional schools that are mostly continuation and alternative schools, than non-LGBTQ+ youth.

EACS is a safe school of choice for LGBTQ+ youth

New Staff for 2023/24



Daniel Favela
School Counselor



Larissa Allen Jefferson
School Counselor



Heather Hathaway
Secondary ToR, ETL &
Music Teacher

Jeremy Murphy
CTE ETL Teacher
(Digital Media)

Lindsay Baker
ETL Teacher

*ETL =
Excel
Teacher
Lead

Substitute Pool

Selina Edwards-Hyde
Virtual Path Substitute

Kari Tackett
Virtual Path Substitute

Alina Moreno
Virtual Path Substitute

Tiffany Cuthbert
Virtual Path Substitute

Virtual Path

- Onboarded a pool of substitute teachers for our Virtual and ETL teachers when staff are out of office
- Improved the Virtual Path classroom experience and control with GoGuardian Teacher, which enables teachers to see what students are working on in real time
- The Virtual Path is growing in enrollment!

Elementary

- Elementary rolled out school wide reading fluency assessments in addition to i-Ready
- Recruited an internal Excel Academy staff member as a Support Counselor to focus on Elementary needs

Secondary

- Welcome 2 new counselors and 2 new high school teachers
- Opened up new Excel Teacher Led classes:
 - CTE Digital Media
 - AP PreCalculus
 - Student Leadership
 - Spanish 2
 - Music Appreciation
 - Visual Arts

Special Education

Introduced our new mini-seminar PD format for staff training on SpEd/GenEd collaboration

Implementing use of The CORE Project (counseling curriculum) for students in Middle School and High School

Implementing use of Generation Genius for supplemental SpEd math support K-8



Launched our NEW free classes for students: painting/drawing, music (recorder, ukulele, vocals,) and Social Emotional Learning!

Community



EXCEL ACADEMY

SUMMER SOCIALS

FOR ALL NEW & CURRENT EXCEL ACADEMY FAMILIES!

FREE CRAFT FOR THE KIDS!

- Meet Excel staff & other new Excel families
- Browse through curriculum & get your questions answered
- Win prizes
- Feel more confident in your educational journey with Excel Academy!

PLEASE FEEL FREE TO DROP ON BY - NO RSVP NECESSARY! WE'D LOVE TO MEET YOU!

Aug. 7
9-10:30 AM Chino - Olympic Park
11:30-1:00 PM Riverside - Orange Terrace Community Park

Aug. 8
9-10:30 AM Huntington Beach - Peter Green Park
12-1:30 PM Glendale - Carr Park

Aug. 9
10-11:30 AM Brea - Wildcatters Park

Aug. 10
9-10:30 AM San Diego - De Anza Cove Park
12-1:30 PM Laguna Hills - Dinosaur Park

Summer Socials in the months of July and August drew in 137 students, new and returning!



EXCEL ACADEMY

CHECK OUT THE FREE CLASSES

Excel Academy is offering this year!

- ART** Mondays/Tuesdays
- SOCIAL EMOTIONAL LEARNING** Wednesdays
- TEEN TALK** Wednesdays
- MUSIC** Thursdays/Fridays

NO REGISTRATION NECESSARY!

TIME OF EACH CLASS IS SPLIT BY GRADE LEVEL:

- TK-1st 9:00-9:30am (all classes)
- 2nd-4th 9:35-10:05am (all classes)
- 5th-6th 10:10-10:40am (all classes)
- 7th-8th 10:45-11:15am (all classes)
- 9th-12th 11:20-11:50 (Teen Talk)

All classes start the week of 8/28

Materials for each class are linked below.

New Purchasing Process & Procedures

Developed by our Business Services team to track spending, forecast expenses, and have a better understanding of Excel Academy's financial standing.

REQUISITION FORM INSTRUCTIONS

Columns A-N (Requestor)

LINE	ITEM	ITEM OR SERVICE	UNIT	QUANTITY	UNIT PRICE	TOTAL PRICE	ESTIMATED DATE OF ORDER	ESTIMATED DATE OF DELIVERY	APPROVALS	REMARKS	STATUS	APPROVED BY	DATE
0000000001	0000000001	100 8 1/2 Copy Paper 500s	500	1	\$2.00	\$2.00	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023
0000000002	0000000002	City of Excel Academy - Board of Directors	1	1	\$1.00	\$1.00	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023
0000000003	0000000003	Medical Office - Medical Office Chair For The	1	1	\$1.00	\$1.00	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023
0000000004	0000000004	Operational Costs - Cleaning - Labor For The	1	1	\$1.00	\$1.00	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023
0000000005	0000000005	Operational Costs - Single Standard Cabinet Case	1	1	\$1.00	\$1.00	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023	10/15/2023

[Requisition Form Instructions](#)
[Link to 1021-1024 Requisition Form](#)

DEPARTMENTS

Department	Department Approver
Conference/PD	Lauren Hansen
Human Resources (901)	Megan Anderson
Assessments (903)	Jenny Craig
Educational Services (906)	Keri Schneeweiss
Special Education (SpEd) (907)	Lara Ulmer
Intervention/Title I (908)	

CREDIT CARD PURCHASES

Detailed Descriptions

- Date of Event
- Item Description
- Purpose of Purchase

Compliance Examples:

- Itemized Receipts
- Meeting Agendas/Attendees
- Event Flyers

Small School District Association Conference (SSDA) for Superintendents





Thank you!

Coversheet

Student Achievement Data - Presented by Jenny Craig, Director of Assessment & Accountability

Section: X. Correspondence/Proposals/Reports
Item: B. Student Achievement Data - Presented by Jenny Craig, Director of
Assessment & Accountability
Purpose: Discuss
Submitted by:
Related Material: Assessment Update - Board Meeting 9-14-2023.pdf

Excel Academy Charter School's Assessment Update



Soaring into the 23-24 school year!



ASSESSMENT GUIDE FOR PARENTS - (Parent signature indicates that the parent is aware of all required assessments.)

The tests indicated are the assessments student(s) are required to take during the 2023-2024 school year. This form does not include state testing for English Learners (Initial and Summative ELPAC) nor high school assessments (SAT, ACT). In addition to i-Ready, K-6 students will take a reading fluency inventory in the fall and spring with their ToR/VT. 9-12th grade students are subject to take the CAST based on state recommendation. i-Ready testing windows are in September, November (WIN & Shoreline students), and March (see EACS Handbook for details). CAASPP (CAST/SBAC) spring dates are TBD. Parents can print a copy of this document and write their student's names next to the appropriate grade level.

*Parent Signature _____

STUDENT NAME(S)	GRADE LEVEL	Benchmark/i-READY	CAASPP (SBAC)	CAST (Science)	PFT
_____	TK	TK Benchmark	N/A	N/A	N/A
_____	K	i-READY	N/A	N/A	N/A
_____	1	i-READY	N/A	N/A	N/A
_____	2	i-READY	N/A	N/A	N/A
_____	3	i-READY	English Language Arts/Math	N/A	N/A
_____	4	i-READY	English Language Arts/Math	N/A	N/A
_____	5	i-READY	English Language Arts/Math	Science	PFT
_____	6	i-READY	English Language Arts/Math	N/A	N/A
_____	7	i-READY	English Language Arts/Math	N/A	PFT
_____	8	i-READY	English Language Arts/Math	Science	N/A
_____	9	i-READY	N/A	TBD	PFT
_____	10	i-READY	N/A	TBD	N/A
_____	11	i-READY	English Language Arts/Math	TBD	N/A
_____	12	N/A	N/A	TBD	N/A

State and Internal Required Assessments

i-Ready Diagnostic Benchmark Assessment - Testing Windows

- ❑ Testing window #1 began 9/5 - ALL Students
- ❑ Testing window #2 begins 11/6 - WIN and Shoreline Students
- ❑ Testing window #3 begins 3/4 - ALL Students

i-Ready identifies students who are working above and below grade level

Students working below grade level are placed in the WIN (What I Need) intervention program - provided individualized resources and interventions

Personalized lessons are created and encouraged to build skills

Overall: Reading & Math Results

Academic Year: 2022-23 (1) | Test View: Standard View (1) | Test Window: Spring (1) | Grade | Gender | RA

Socio-Econ. Disadvanta... | English Learner | Language Acquisition S... | Foster Youth | Homeless | St

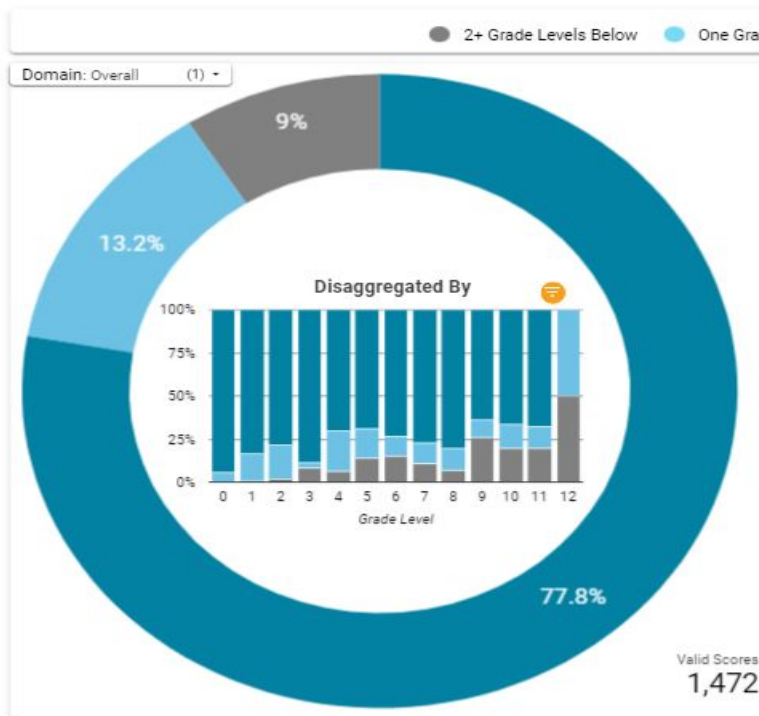
Test Site | Enrollment Length | Enrolled

Spring 2023 Celebrations

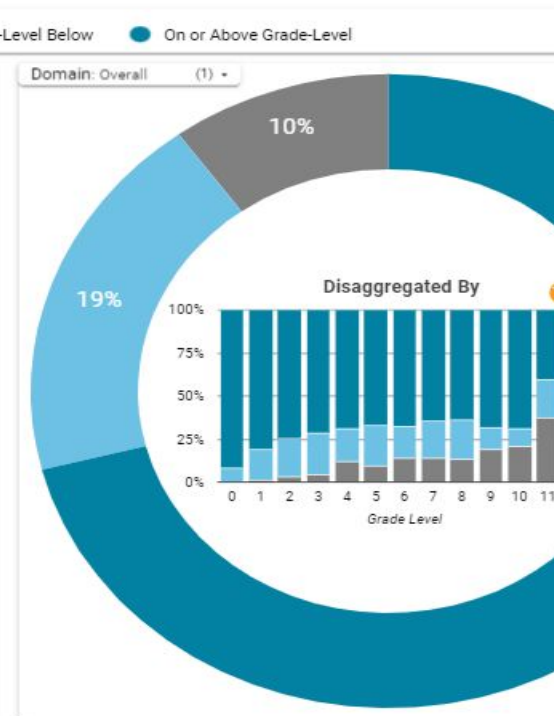
Over **70%** of EACS students were at or above grade level in reading and math!

EL students grew by **11%** in reading and **40%** in math!

Overall Reading Results



Overall Math Results



ELPAC Assessment Celebrations

Summative ELPAC Assessments -

- 44 students tested - 73% scored a 3 or 4!
- 41% of students showed significant growth!
- 32% of students reclassified fluent English proficient (RFEP) - scored a 4 overall!

Initial ELPAC Assessments -

- 26 students identified as TBD - Students Home Language Survey (HLS) indicates a language other than English
- Required testing within the first 30 days of school

Next Steps Towards Progress -

- Required completion of ELD Curriculum and Live Instruction - Focus on reading , writing, listening, and speaking skills
- Held ELAC Meeting - Shared expectations with families



October Board Meeting Highlights

- Presentation of disaggregated data
 - Overview and Growth - Year Over Year Comparisons
 - i-Ready and CAASPP
- Next step strategies
 - Forward planning with the general education and intervention teams
 - Strategic deep dive with teachers - October Regional Meeting
 - Goal setting with students
 - Parent Education - curriculum content and teaching strategies



Thank you!

Without continual
growth and progress,
such words as
improvement,
achievement, and
success have no
meaning.
— Benjamin Franklin

Coversheet

Consent - Business/Financial Services

Section: XI. Consent
Item: A. Consent - Business/Financial Services
Purpose:
Submitted by:
Related Material: EACS Property and Casualty Insurance.pdf
APLUS+ Conference 2023 Overview for Presenters and Attendees 2.pdf
APLUS+ Invoice Excel Academy Conference 2023.docx.pdf
8.25.23 SM CashRequirementRpt..pdf
8.25.23 MO CashRequirementRpt..pdf
7.10.23 Cash Requirements Statement.pdf
8.10.23 Cash Requirement Rpt..pdf
8.25.23 Bonus MO CashRequirementRpt..pdf
8.25.23 Bonus SM CashRequirementRpt..pdf
7.26.23 MO Cash Requirements Statement.pdf
7.26.23 SM Cash Requirements Statement.pdf
Check register 060123-063023.pdf
Check register 070123-073123.pdf
Check register 080123-083123.pdf
Authorization_of_Signatures for Contracts and Banking.pdf

BACKGROUND:

Item: Approval of Authorization of Signatures

Background: Authorization of Signatures is an item which is routinely updated to reflect changes in personnel and to comply with the requirement of the policies of the Board and internal control procedures. The signatures are applicable to various documents which are approved by the Board of Directors and in compliance with state and federal laws.

Excel Academy Charter School wishes to designate certain persons employed by the Charter School to sign documents of the Charter School on its behalf.

Item: Approval of APLUS+ Network Conference 2023

Background: The Excel Academy Leadership Team members will attend the APLUS+ conference yearly, to gain knowledge and expertise in charter school related topics such as:

- Administrative Leadership
- Advocacy Strategies, Community Relations, & Outreach Successes

- Assessment & Accountability Strategies for Personalized Learning
- Compliance, Financial, and Legal Issues in the “New Era”
- Data Collection, Analysis, & Reporting Strategies
- Instructional Strategies for Achievement
- Preparing Students for Their Goals in Life
- Specialized Programs for Personalized Learning Students

Fiscal Impact: For nine attendees, the cost amount to: \$5,976.45.

Item: Ratification of the Bolton Property and Casualty Insurance Renewal

Background: As the School’s insurance broker, Bolton & Company completed the annual process to review and negotiate renewal rates for all insurance policies held by Corporation. The renewal rates took effect July 1, 2023.

It is recommended the Board approve the renewal rates for all property and casualty insurance policies for the 2023-2024 school year including: Property, General Liability, Automobile, Umbrella Liability, Educators Legal Liability, Directors and Officers, Employment Practices Liability, Workers’ Compensation, Student Accident, and Cyber Security.

RECOMMENDATION:

It is recommended the Board approve the Leadership Team members to attend the APLUS+ Conference 2023 as presented.

A Renewal Proposal for

Excel Academy Charter Schools

Effective: July 1, 2023

Jonathan Schreter, MBA, CIC
Executive Vice President

Craig Myers
Associate Vice President

Bolton Insurance Services, LLC
License # 6004772

Prepared: June 21, 2023

Excel Academy Charter Schools

Service Team

Brokers	Jonathan Schreter, Executive Vice President	Direct: (626) 535-1408 Fax: (626) 583-4609
	E-mail: jschreter@boltonco.com	
	Craig Myers, Associate Vice President	Direct: (626) 535-1447 Fax: (626) 583-4609
	E-mail: cmyers@boltonco.com	
Service Team	Debra Rosas, Vice President, Education Practice Group	Direct: (626) 535-1829
	E-mail: drosas@boltonco.com	
	Gayana Asatryan, Client Analyst	Direct: (626) 535-1966
	E-mail: gasatryan@boltonco.com	
	Service Team Fax:	(626) 583-2117

Property & Casualty Resources

Certificates/ Evidences	Standard - Receipt in 24 Hours		Rush - Receipt in 3 Hours	
	Email: certrequest@boltonco.com		Email: rushcertrequest@boltonco.com	
	Fax: (626) 583-2117			
Property & Casualty Claims	Marianne Reyes, Senior Claims Consultant			
	Direct: (626) 507-1344		Fax: (626) 583-2117	
	E-mail: mreyes@boltonco.com			
Workers' Comp Claims	Lorenda Edmundson, Sr. Workers' Comp Consultant			
	Direct: (626) 535-1815		Fax: (626) 583-2117	
	E-mail: ledmundson@boltonco.com			
Risk Control	Stefanie Nobriga, Associate Vice President of Risk Control			
	Direct: (626) 535-1436		Fax: (626) 583-2117	
	E-mail: snobriga@boltonco.com			
Bonds	Mary Smith, Associate Producer Surety			
	Direct: (626) 535-1473		Fax: (626) 583-2124	
	E-mail: msmith@boltonco.com			



Excel Academy Charter Schools

Department Leads

Property & Casualty	Erin Powell, Senior Vice President, Property & Casualty	
	Direct: (626) 535-1439	Fax: (626) 583-2117
	E-mail: epowell@boltonco.com	

Employee Benefits	Johanna Alvarez, CA Market Leader for Employee Benefits	
	Direct: (626) 535-1493	Fax: (626) 583-2119
	E-mail: jalvarez@boltonco.com	

Personal Risk Management	Jessica Gunnar, Senior Vice President	
	Direct: (626) 535-1817	Fax: (626) 583-2116
	E-mail: jgunnar@boltonco.com	



Premium Comparison

Excel Academy Charter Schools

	2022-2023	2023-2024	\$	%
	Expiring Premium	Renewal Premium	Difference	Difference
Property including Inland Marine	\$ 722	\$ 474	\$ (248)	-34%
Automobile	\$ 3,412	\$ 3,936	\$ 524	15%
General Liability	\$ 18,456	\$ 18,456	\$ -	0%
Umbrella	\$ 7,534	\$ 7,710	\$ 176	2%
Educators Legal Liability including D&O and EPL	\$ 22,984	\$ 26,927	\$ 3,943	17%
Crime	\$ 3,886	\$ 4,018	\$ 132	3%
Student Accident	\$ 3,141	\$ 3,141	\$ -	0%
Cyber Liability	\$ 10,395	\$ 11,165	\$ 770	7%
Fee	\$ 150	\$ 150	\$ -	0%
Surplus Lines Taxes & Fees	\$ 338	\$ 355	\$ 17	5%
Workers' Compensation*	\$ 48,078	\$ 49,477	\$ 1,399	3%
State Taxes	\$ 2,767	\$ 2,806	\$ 39	1%
TOTAL	\$ 121,863	\$ 128,615	\$ 6,752	6%

*2023 Estimated Premium until WCIRB releases the revised experience modification

This proposal is a summary of terms and conditions proposed by the insurers based on the information obtained from you. The policy must be reviewed for all of the coverages, terms, conditions, and exclusions. Policy forms will be made available at your request.
The issued policy will supersede this proposal.

Higher Limits May be Available for All Coverages



Subjectivities

WORKERS COMPENSATION

Independent Contractors and Subcontractors:

In the event that an Insured utilizes subcontracted labor, the insured must furnish satisfactory evidence that the subcontractor has workers compensation insurance in force, covering the work performed for the insured. The following documents may be used to provide satisfactory evidence:

- Certificate of Insurance for the subcontractor's workers compensation policy
- Certificate of exemption (if available in their state - not available in CA)
- Copy of the Subcontractor's workers compensation policy

In the event any form of this documentation is not available for review or deemed otherwise insufficient, amounts paid to these subcontractors or independent contractors will be included as payroll and utilized in the calculation of final audit premium

Package Subject to:

Signed Statement of Values

Prior Carrier Loss Runs

Cyber Subject to:

Completion of the Name and Signature of the IT contact on Question #5, page 2, of the application

Answer to question #3. Revenues

Answer to question #6.c.(2)

Answer to question #7.f.

Resigned application redated within 45 days of the effective date by the officer of the company (Owner, President, CEO, or COO)

Named Insureds

Excel Academy Charter Schools
FKA Community Collaborative Charter School



Schedule of Locations

- 1 1 Technology Dr. Bldg 1811, Irvine, CA 92618
- 2 87-3163 Mamalahoa Hwy, Captain Cook, HI 96704 (Work Comp)

Statement of Values

2022-2023

Loc #	Entity Name/ Location	Occupancy	Buildings	Business Personal Prop.	EDP	Bus. Income/ Extra Expense	Year Built/ Year Roof & Elec Updated	Const. Type/ Roof Type	# Stories	Total Bldg. Sq. Ft./ Occupied Sq. Ft.	Sprinklers	Local/ Central Alarm
1	1 Technology Dr. Bldg 1-811 Irvine, CA 92618	Office	\$0	\$11,000	\$100,000	\$10,325						
TOTAL			\$0	\$11,000	\$100,000	\$10,325						

Date

Name of Insured: Excel Academy Charter Schools

By: _____

Title: _____



Renewal Proposal of Insurance 2023-2024

Excel Academy Charter Schools

	2022-2023	2023-2024	
	Expiring	Renewal	Remarks
Property	Philadelphia A++ XV Admitted	Philadelphia A++ XV Admitted	
Business Personal Property	\$10,000	\$11,000	
Business Income/Extra Expense	\$10,325	\$10,325	
Business Personal Property Deductible	\$1,000	\$1,000	
Business Income Waiting Period	24 Hours	24 Hours	
Earthquake Sprinkler Leakage	\$10,000	\$10,000	
Equipment Breakdown	Included	Included	
<u>Locations:</u> See Statement of Values			
<u>CONDITIONS</u> : Special Form; Replacement Cost; 90% Co-Insurance. Includes Philadelphia Bell Endorsement, Workplace Violence Loss of Income Endorsement, Crisis Management Endorsement and Elite Property Enhancement: Schools			
<u>EXCLUSIONS</u> : Including, but not limited to Virus or Bacteria; Mold; Inflatable Structures; Earthquake and Flood			
	Philadelphia A++ XV Admitted	Philadelphia A++ XV Admitted	
Inland Marine			
Blanket Computer Coverage	\$50,000	\$50,000	
Blanket Monthly Limit of Indemnity	\$10,000	\$10,000	
While In Transit	\$10,000	\$10,000	
Transfer between Premises	\$10,000	\$10,000	
Temp within other Premises	\$10,000	\$10,000	
Permanently located at an employee's residence	\$10,000	\$10,000	
Deductible	\$1,000	\$1,000	
<u>EXCLUSIONS</u> : Including, but not limited to Governmental Action; Nuclear Hazard; Off-Premises Services; War or Military Action; Earthquake and Flood			

Renewal Proposal of Insurance 2023-2024

Excel Academy Charter Schools

	2022-2023 Expiring Philadelphia A++ XV Admitted	2023-2024 Renewal Philadelphia A++ XV Admitted	Remarks
Business Auto			
Auto Liability - Non-Owned & Hired	\$1,000,000	\$1,000,000	
Hired Auto Physical Damage - Cost of Hire	\$5,000	\$5,000	
Hired Auto Physical Damage Deductibles	\$1,000 Comp \$1,000 Coll	\$1,000 Comp \$1,000 Coll	
<u>CONDITIONS</u> : Employees and Volunteers as Insureds; Employees as Insureds for Hired Autos			
<i>We are not aware of any excluded drivers at the time of quoting. The carrier may review driving records and exclude any drivers that do not meet their guidelines of acceptability.</i>			



Renewal Proposal of Insurance 2023-2024

Excel Academy Charter Schools

	2022-2023 Expiring Philadelphia A++ XV Admitted	2023-2024 Renewal Philadelphia A++ XV Admitted	Remarks
General Liability			
General Aggregate Limit	\$3,000,000	\$3,000,000	
Products-Completed Operations Aggregate	\$3,000,000	\$3,000,000	
Personal & Advertising Injury Limit	\$1,000,000	\$1,000,000	
Each Occurrence Limit	\$1,000,000	\$1,000,000	
Damage to Premises Rented to You Limit - Any One Premises	\$300,000	\$300,000	
Medical Payments Limit - Any One Person	\$15,000	\$15,000	
Sexual/Physical Abuse or Molestation/Aggregate	\$1,000,000/\$3,000,000	\$1,000,000/\$3,000,000	
Employee Benefits Liability/Aggregate	\$1,000,000/\$3,000,000	\$1,000,000/\$3,000,000	
Deductible	N/A	N/A	
Student Count	1,809	1,809	

CONDITIONS: Employee Benefits Liability is a Claims-Made & Reported Form. Retroactive Date: 7/15/2015; Includes Employee Defense Coverage; Volunteers and Employees as Insureds; Fund Raising Events Endorsement; General Liability Deluxe: Schools Endorsement

The wording adding additional insured status for vendors, landlords, contractors or owners on your Commercial General Liability Policy applies only when there is a written contract between you and one of these entities requiring they be added to your policy as an additional insured. Please make sure to advise us if there is no contract at the time these are requested so special arrangements can be made with your insurance carrier. An unaltered purchase order is not considered a contract. Requests from these entities for additional insured status with no contract in force should be resisted as you have no legal obligation to provide this and claims against your policy in this situation could reduce the liability limits on your policy.

EXCLUSIONS: Including, but not limited to Asbestos; Employment-Related Practices; Fungi or Bacteria; Lead; Communicable Disease; Athletic or Sports Participants; Corporal Punishment; Nuclear Energy; Absolute Cyber Liability and Electronic;



Renewal Proposal of Insurance 2023-2024

Excel Academy Charter Schools

	2022-2023 Expiring	2023-2024 Renewal	Remarks
Umbrella	Philadelphia A++ XV Admitted	Philadelphia A++ XV Admitted	
Per Occurrence	\$4,000,000	\$4,000,000	
Aggregate Limit	\$4,000,000	\$4,000,000	
Retention	\$10,000	\$10,000	
<u>CONDITIONS</u> : Limits are excess of Primary General Liability, Sexual Abuse or Molestation, Employee Benefits Liability, Non-Owned & Hired Auto Liability, Employers Liability			
<u>EXCLUSIONS</u> : Including, but not limited to Fungi or Bacteria; Lead; Directors and Officers Liability; Silica; Subsidence; Liquor Liability; Employers Liability (Stop Gap); Designated Professional Services; Athletic Participants and Officials; Medical Professional Liability; Cyber Liability and Electronic			
Educators Professional Select	Philadelphia A++ XV Admitted	Philadelphia A++ XV Admitted	
Educators Legal Liability - Each Claim/Aggregate	\$2,000,000/\$2,000,000	\$2,000,000/\$2,000,000	
Retention-Per Claim	\$25,000	\$25,000	
Employment Practices Liability - Each Claim/Aggregate	\$2,000,000/\$2,000,000	\$2,000,000/\$2,000,000	
Retention-Per Claim	\$25,000	\$25,000	
Policy Aggregate	\$2,000,000	\$2,000,000	
Non-Monetary Defense - Occurrence/Aggregate	\$100,000/\$300,000	\$100,000/\$300,000	
Retention-Per Claim	\$10,000	\$10,000	
<u>CONDITIONS</u> : Claims-Made & Reported Form; Retroactive Date: 7/15/2015 Includes Wrongful Acts arising out of Education, Employment Practices, Directors, Officers and Trustees; Defense costs paid in addition to the policy limit; Includes Third Party Coverage in respects to Employment Practices Liability; Shared Limits; 12 Month Extended Reporting Period; Includes Crisis Management Enhancement Endorsement			
<u>EXCLUSIONS</u> : Including, but not limited to Pollution; Asbestos; Bodily Injury or Property Damage; Fraudulent, Dishonest, Malicious, Criminal or Intentional Wrongful Acts or Omissions; Fungi, Bacteria or Organic Pathogens; Intellectual Property; Lead; Personal and Advertising Injury; Radioactive/Nuclear Materials; Sexual Abuse & Molestation; War; Failure to Maintain Insurance; Securities; Access or Disclosure of Confidential or Personal Information; Wage and Hour Violations			



Coverage Re-Cap 2023-2024

Excel Academy Charter Schools

Philadelphia Indemnity Umbrella \$4,000,000			Philadelphia Indemnity Educators Professional Select Professional Liability/ Directors & Officers Liability/ Employment Practices Liability \$2,000,000
Oak River Employer's Liability \$1,000,000	Philadelphia Indemnity General Liability/ Employee Benefits Liability/ Sexual Abuse & Molestation \$1,000,000	Philadelphia Indemnity Auto Liability \$1,000,000	



Renewal Proposal of Insurance 2023-2024

Excel Academy Charter Schools

	2022-2023	2023-2024	
	Expiring	Renewal	Remarks
Crime	Hanover A XV Admitted	Hanover A XV Admitted	
Employee Theft	\$1,000,000	\$1,000,000	
ERISA Fidelity	\$1,000,000	\$1,000,000	
Client Property	\$1,000,000	\$1,000,000	
Forgery or Alteration	\$1,000,000	\$1,000,000	
Premises Coverage	\$1,000,000	\$1,000,000	
Transit Coverage	\$1,000,000	\$1,000,000	
Computer Fraud	\$1,000,000	\$1,000,000	
Funds Transfer Fraud	\$1,000,000	\$1,000,000	
Credit, Debit or Charge Card Fraud	\$1,000,000	\$1,000,000	
Money Orders & Counterfeit Money	\$1,000,000	\$1,000,000	
Investigative Expense	\$15,000	\$15,000	
Deductible	\$5,000	\$5,000	
<u>CONDITIONS:</u> Loss Sustained Form			
Student/Volunteer Accident	Philadelphia A XV Admitted	Philadelphia A XV Admitted	
Basic Medical Expense Limit	\$50,000	\$50,000	
Deductible	\$0	\$0	
Benefit Period	52 Weeks	52 Weeks	
Accidental Death/Accidental Dismemberment	\$25,000/\$50,000	\$25,000/\$50,000	
Coma		\$10,000	
Accidental Paralysis	\$50,000	\$50,000	
Bereavement and Trauma Counseling		\$100/Session up to 10	
Dental		\$250/Tooth Per Accident	
Catastrophic Expense Limit	\$7,500,000	\$7,500,000	
Deductible	\$25,000	\$25,000	
Benefit Period	520 Weeks	520 Weeks	
Accidental Death & Dismemberment	\$10,000/\$20,000	\$10,000/\$20,000	
<u>CONDITIONS:</u> This policy is excess over primary health insurance if available. Incurred Period is 180 Days for Medical Expenses and 365 days for AD&D. Authorized Volunteers and Enrolled Students are Insureds.			
<u>EXCLUSIONS:</u> Please see the policy for a full list of exclusions.			



Renewal Proposal of Insurance 2023-2024

Excel Academy Charter Schools

		2022-2023	2023-2024	Renewal	Remarks
		Expiring	2023-2024	Renewal	Remarks
		Houston Casualty	Houston Casualty	Houston Casualty	Houston Casualty
		A++ XV Non-Admitted	A++ XV Non-Admitted	A++ XV Non-Admitted	A++ XV Non-Admitted
Cyber Liability					
Maximum Policy Aggregate Limit of Liability		\$1,000,000		\$1,000,000	
Multimedia Liability		\$1,000,000		\$1,000,000	
Security and Privacy Liability		\$1,000,000		\$1,000,000	
Privacy Regulatory Defense and Penalties		\$1,000,000		\$1,000,000	
PCI DSS Liability		\$1,000,000		\$1,000,000	
Bodily Injury Liability		\$1,000,000		\$1,000,000	
Property Damage Liability		\$50,000		\$50,000	
TCPA Defense		\$1,000,000		\$1,000,000	
Breach Events Costs		\$1,000,000		\$1,000,000	
Post Breach Remediation Costs		\$25,000		\$25,000	
BrandGuard		\$1,000,000		\$1,000,000	
System Failure		\$1,000,000		\$1,000,000	
Dependent System Failure		\$1,000,000		\$1,000,000	
Cyber Extortion		\$1,000,000		\$1,000,000	
Cyber Crime Sublimit Aggregate		\$250,000		\$250,000	
Financial Fraud Sublimit		\$250,000		\$250,000	
Telecommunications & Utilities Fraud Sublimit		\$250,000		\$250,000	
Phishing Fraud Aggregate Sublimit		\$250,000		\$250,000	
Your Phishing Fraud Loss		\$250,000		\$250,000	
Client Phishing Fraud Loss		\$50,000		\$50,000	
Bricking Loss		\$250,000		\$250,000	
Property Damage Loss		\$50,000		\$50,000	
Reward Expense		\$50,000		\$50,000	
Court Attendance Costs		\$25,000		\$25,000	
Additional Defense Costs		\$1,000,000		\$1,000,000	
Breach Events Costs Outside Limit		Included		Included	
Deductible		\$5,000		\$5,000	
<p>CONDITIONS : BrandGuard (2 week Waiting period; 12 months Period of Indemnity), System Failure (8 hour waiting period 6 months Period of Indemnity), Dependent System Failure (12 hour waiting period; 4 months Period of Indemnity), Cyber Crime Sublimit \$250,000 (includes: Financial Fraud, Telecommunications Fraud, \$250,000 Phishing Fraud), Court Attendance Costs Sublimit (No deductible);</p> <p>EXCLUSIONS : Including, but not limited to Nuclear Incident; Prior Knowledge; Cyber-bullying; War and Cyber War</p>					



Workers' Compensation Comparison

Excel Academy Charter Schools

Workers' Compensation	2022-2023 Expiring	2023-2024 Renewal	Remarks
	Oak River A+ XV Admitted	Oak River A+ XV Admitted	
Employers Liability Limits	\$ 1,000,000	\$ 1,000,000	
Quote is contingent upon the insured's participation in the Medical Provider Network (MPN); Subject to Final Audit; Volunteer Coverage Not Included. USL&H Not included.			

Coverage Description	2022-2023 Premium	2023-2024 Premium	\$ Difference	% Difference
Workers' Compensation	\$ 48,078	\$ 49,477	\$ 1,399	3%
Taxes & Fees	\$ 2,767	\$ 2,806	\$ 39	1%
Premium	\$ 50,845	\$ 52,283	\$ 1,438	3%

Classifications	2022-2023 Payroll	2023-2024 Payroll	\$ Difference	% Difference
Class Code 8868 –College: Professional Employees - Alabama	If Any	If Any		
Class Code 8875 – Public Colleges/Schools - California	\$ 7,775,639	\$ 9,669,649	\$ 1,894,010	24%
Class Code 8868– College: Professional Employees - Hawaii	\$ 150,796	\$ 153,396	\$ 2,600	2%
Class Code 8868 –College: Professional Employees - Idaho	If Any	If Any	\$ -	0%
Class Code 8868 – College: Professional Employees - New York	If Any	If Any	\$ -	0%
Class Code 8868– College: Professional Employees - Oregon	If Any	If Any	\$ -	0%
Class Code 8868– College: Professional Employees - Texas	If Any	If Any	\$ -	0%
Class Code 8868– College: Professional Employees - Wisconsin	If Any	If Any	\$ -	0%
Total Payroll	\$ 7,926,435	\$ 9,823,045	\$ 1,896,610	24%



Workers' Compensation Comparison

Classifications	2022-2023 Net Rate	2023-2024 Net Rate	# Difference	% Difference
Class Code 8868 – College: Professional Employees - Alabama	0.48	0.40	-0.08	-17%
Class Code 8875 – Public Colleges/Schools - California	0.60	0.50	-0.1	-17%
Class Code 8868– College: Professional Employees - Hawaii	0.73	0.61	-0.12	-16%
Class Code 8868 –College: Professional Employees - Idaho	0.64	0.53	-0.11	-17%
Class Code 8868 – College: Professional Employees - New York	0.57	0.48	-0.09	-16%
Class Code 8868– College: Professional Employees - Oregon	0.37	0.31	-0.06	-16%
Class Code 8868– College: Professional Employees - Texas	0.26	0.22	-0.04	-15%
Class Code 8868– College: Professional Employees - Wisconsin	0.50	0.42	-0.08	-16%
Experience Modification - California*	0.60	0.50	-0.1	-17%

Net Rates do not include Expense Constant, Terrorism, or CA Assessments & Fees.

*2023 Experience Modification is estimated, pending revised calculation by the WCIRB. Premium may be adjusted once the experience modification is released.

Insurance Coverage Checklist

Below is a list of usually available, but not all inclusive, coverages. Those items checked represent the coverages proposed. If the item is not checked, the coverage is not included. If you are interested in an explanation of and/or quotation for any of these coverages, please let us know.

<input checked="" type="checkbox"/>	Property (Building and Contents, Including Property of Others)	<input checked="" type="checkbox"/>	Crime/ERISA
<input checked="" type="checkbox"/>	Building Ordinance	<input checked="" type="checkbox"/>	Employee Dishonesty
<input checked="" type="checkbox"/>	Equipment Breakdown	<input checked="" type="checkbox"/>	Money and Securities
<input checked="" type="checkbox"/>	Business Income	<input checked="" type="checkbox"/>	Forgery and Alteration
<input checked="" type="checkbox"/>	Extra Expense	<input checked="" type="checkbox"/>	Computer Fraud
<input type="checkbox"/>	Loss of Rents	<input checked="" type="checkbox"/>	General Liability
<input type="checkbox"/>	Flood	<input checked="" type="checkbox"/>	Employee Benefits Liability
<input type="checkbox"/>	Earthquake	<input type="checkbox"/>	Aircraft Liability/Drone
<input checked="" type="checkbox"/>	Earthquake Sprinkler Leakage	<input checked="" type="checkbox"/>	Automobile
<input checked="" type="checkbox"/>	Electronic Data Processing	<input type="checkbox"/>	Foreign Property/Liability/WC
<input type="checkbox"/>	Signs	<input checked="" type="checkbox"/>	Umbrella/Excess Liability
<input type="checkbox"/>	Motor Truck Cargo Liability	<input checked="" type="checkbox"/>	Workers' Compensation Employers Liability
<input type="checkbox"/>	Transportation	<input checked="" type="checkbox"/>	Directors and Officers Liability
<input type="checkbox"/>	Ocean Cargo	<input checked="" type="checkbox"/>	Employment Practices Liability
<input type="checkbox"/>	Employee's Tool Floater	<input type="checkbox"/>	Fiduciary Liability
<input type="checkbox"/>	Equipment Floater	<input type="checkbox"/>	Kidnap & Ransom
<input type="checkbox"/>	Installation Floater	<input checked="" type="checkbox"/>	Cyber/Privacy Liability/Internet Exposure
<input checked="" type="checkbox"/>	Valuable Papers (On & Off Premises)	<input checked="" type="checkbox"/>	Educators Legal Liability
<input checked="" type="checkbox"/>	Accounts Receivable	<input type="checkbox"/>	Pollution Liability
<input type="checkbox"/>	Mold	<input type="checkbox"/>	Miscellaneous Professional Liability
<input type="checkbox"/>	Terrorism	<input type="checkbox"/>	Law Enforcement Liability
<input checked="" type="checkbox"/>	Funds Transfer Fraud	<input checked="" type="checkbox"/>	Student Accident
		<input type="checkbox"/>	Active Assailant/Workplace Violence
		<input checked="" type="checkbox"/>	Volunteer Accident

Proposal Acceptance

Excel Academy Charter Schools

<u>Yes</u>	<u>No</u>	<u>Quote Option</u>
_____	_____	Package/Auto/Umbrella/Educators Legal - Philadelphia
_____	_____	Crime - Hanover
_____	_____	Student Accident - Philadelphia
_____	_____	Workers' Compensation - Oak River
_____	_____	Cyber Liability - Tokio Marine

_____ _____ Insurance Coverage Checklist – Would you like a quote for any of the coverages listed on the insurance coverage checklist section of our proposal?

(NOTES:)

This proposal is a summary of terms and conditions proposed by the insurers based on information obtained from you. The policy must be reviewed for all of the coverages, terms, conditions, and exclusions. Policy forms will be made available at your request. The issued policy will supersede this proposal.

Higher limits may be available for all coverages.

I have reviewed and accept the coverages and disclosures as summarized in this proposal with any changes indicated above.

Signature

Date

Title



BEST FINANCIAL STRENGTH RATING GUIDE - (FSR)

A Best's Financial Strength Rating (FSR) is an independent opinion of an insurer's financial strength and ability to meet its ongoing insurance policy and contract obligations. An FSR is not assigned to specific insurance policies or contracts and does not address any other risk, including, but not limited to, an insurer's claims-payment policies or procedures; the ability of the insurer to dispute or deny claims payment on grounds of misrepresentation or fraud; or any specific liability contractually borne by the policy or contract holder. An FSR is not a recommendation to purchase, hold or terminate any insurance policy, contract or any other financial obligation issued by an insurer, nor does it address the suitability of any particular policy or contract for a specific purpose or purchaser. In addition, an FSR may be displayed with a rating identifier, modifier or affiliation code that denotes a unique aspect of the opinion.

Best's Financial Strength Rating (FSR) Scale

Rating Categories	Rating Symbols	Rating Notches*	Category Definitions
Superior	A+	A++	Assigned to insurance companies that have, in our opinion, a superior ability to meet their ongoing insurance obligations.
Excellent	A+	A-	Assigned to insurance companies that have, in our opinion, an excellent ability to meet their ongoing insurance obligations.
Good	B+	B++	Assigned to insurance companies that have, in our opinion, a good ability to meet their ongoing insurance obligations.
Fair	B	B-	Assigned to insurance companies that have, in our opinion, a fair ability to meet their ongoing insurance obligations. Financial strength is vulnerable to adverse changes in underwriting and economic conditions.
Marginal	C+	C++	Assigned to insurance companies that have, in our opinion, a marginal ability to meet their ongoing insurance obligations. Financial strength is vulnerable to adverse changes in underwriting and economic conditions.
Weak	C	C-	Assigned to insurance companies that have, in our opinion, a weak ability to meet their ongoing insurance obligations. Financial strength is vulnerable to adverse changes in underwriting and economic conditions.
Poor	D	-	Assigned to insurance companies that have, in our opinion, a poor ability to meet their ongoing insurance obligations. Financial strength is vulnerable to adverse changes in underwriting and economic conditions.

Financial Strength Non-Rating Designations

Designation Symbols	Designation Definitions
E	Status assigned to insurance companies that are publicly placed under a significant form of regulatory supervision, control or restraint - including cease and desist orders, conservatorship or rehabilitation, but not liquidation - that prevents conduct of normal ongoing insurance operations; an impaired insurer.
F	Status assigned to insurance companies that are publicly placed in liquidation by a court of law or by forced liquidation; an impaired insurer.
S	Status assigned to rated insurance companies to suspend the outstanding FSR when sudden and significant events impact operations and rating implications cannot be evaluated due to lack of timely or adequate information; or in cases where continued maintenance of the previously published rating opinion is in violation of evolving regulatory requirements.
NR	Status assigned to insurance companies that are not rated; may include previously rated insurance companies of insurance companies that have never been rated by A.M. Best

Rating Disclosure - Use and Limitations

A Best's Credit Rating (BCR) is a forward-looking independent and objective opinion regarding an insurer's, issuer's or financial obligation's relative creditworthiness. The opinion represents a comprehensive analysis consisting of a quantitative and qualitative evaluation of balance sheet strength, operating performance, business profile and enterprise risk management or, where appropriate, the specific nature and details of a security. Because a BCR is a forward-looking opinion as of the date it is released, it cannot be considered as a fact or guarantee of future credit quality and therefore cannot be described as accurate or inaccurate. A BCR is a relative measure of risk that implies credit quality and is assigned using a scale with a defined population of categories and notches. Entities or obligations assigned the same BCR symbol developed using the same scale, should not be viewed as completely identical in terms of credit quality. Alternatively, they are alike in category (or notches within a category), but given there is a prescribed progression of categories (and notches) used in assigning the ratings of a much larger population of entities or obligations, the categories (notches) cannot mirror the precise subtleties of risk that are inherent within similarly rated entities or obligations. While a BCR reflects the opinion of A.M. Best Rating Services, Inc. (AM Best) of relative creditworthiness, it is not an indicator or predictor of defined impairment or default probability with respect to any specific insurer, issuer or financial obligation. A BCR is not investment advice, nor should it be construed as a consulting or advisory service, as such; it is not intended to be utilized as a recommendation to purchase, hold or terminate any insurance policy, contract, security or any other financial obligation, nor does it address the suitability of any particular policy or contract for a specific purpose or purchaser. Users of a BCR should not rely on it in making any investment decision; however, if used, the BCR must be considered as only one factor. Users must make their own evaluation of each investment decision. A BCR opinion is provided on an "as is" basis without any expressed or implied warranty. In addition, a BCR may be changed, suspended or withdrawn at any time for any reason at the sole discretion of AM Best.

BCRs are distributed via the AM Best website at www.ambest.com. For additional information regarding the development of a BCR and other rating-related information and definitions, including outlooks, modifiers, identifiers and affiliation codes, please refer to the report titled "Understanding Best's Credit Ratings" available at no charge on the AM Best website. BCRs are proprietary and may not be reproduced without permission.

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Version 010219



Types of Insurance Carriers

Non-Admitted

This is an insurance carrier that is not licensed by the State of California, but is domiciled and admitted in other states and approved for use in California by the Department of Insurance. It is published on the List of Approved Surplus Lines Insurers (LASLI).

Carriers are strictly regulated by their state of domicile and must meet strict surplus lines laws and regulations in order to provide insurance in California.

These carriers are not backed by the California Insurance Guarantee Association (CIGA). They are used when coverage is not available from an admitted company either because domestic carriers feel it is too risky or because broader coverage may be available from a non-admitted carrier.

Admitted

This is an insurance carrier that is licensed to do business in California and regulated by the Department of Insurance. Carriers are strictly regulated. Rates and policy forms must be filed with the Department of Insurance and approved before they can be offered to the insurance consumer.

The carrier is backed by the Insurance Guarantee Association (CIGA), which provides insurance against carriers which become insolvent. It assumes limited responsibility for all claims up to \$500,000, with the exception of Worker's Compensation, which has no limitation. Ocean Cargo and Crime coverages are not insured through the Association.

Claims-Made and Reported Liability Policy

A Claims-Made and Reported Liability Policy provides third party liability coverage when a claim for damages is first made during the policy period. The incident causing the claim must occur during the policy period between the **retroactive (or continuity date) and the expiration date**, whichever is later. The claim must be reported to the carrier prior to the policy expiration date or **extended reporting period**.

Retroactive Date

The **retroactive date** is important in determining if a Claims-Made and Reported Policy will respond to a claim. This date is usually the same as the first date this coverage was first carried. For coverage to apply, the claim must fall between the **retroactive (or continuity) date** and the expiration date of the policy or **extended reporting period**.

Extended Reporting Period

As mentioned above, the claim must occur and be reported prior to the end of the expiration date or **extended reporting period**. An extension of time to report claims following the end of the expiration date may be purchased for claims made during the specified term purchased. This extension or **extended reporting period** is needed when a policy is cancelled or non-renewed and not placed with another carrier, renewed with an advanced **retroactive date** or changed to an "occurrence" form policy. Please note the **extended reporting period** does not extend the coverage period, only the time to report. The **extended reporting period** is usually available for a period of 12, 24, or 36 months, in some cases longer.

Continuity Date

This is the first date that a policy or particular limit is carried. It may act as a **retroactive date**. Some policies may have a **retroactive date and a continuity date**, especially if limits have been changed over the years.

It is very important that careful consideration be given to all of the above issues when moving coverage provided by a claims-made and reported policy.

CERTIFIED TERRORISM Terrorism Risk Insurance Act – “TRIA” and Terrorism Risk Insurance Program Reauthorization Act of 2015 – “TRIPRA”)

"Certified Terrorism" is coverage offered by insurance carriers that have the financial backing of the U. S. government under the Terrorism Act of 2002, the Terrorism Risk Insurance Extension Act of 2005, the Reauthorization Act of 2007 and the Reauthorization Act of 2015. The Act is known as “TRIA.”

"Certified Terrorism" is defined under the act as: Any act that is certified by the Secretary of the Treasury, in consultation with the Secretary of Homeland Security, and the Attorney General of the United States, to be an act of terrorism. Criteria include:

- a. The act is an act of terrorism.
- b. The act is violent or dangerous to human life, property of infrastructure.
- c. The act resulted in damage within the United States, or outside of the United States Missions or certain air carriers or vessels.
- d. The act has been committed by an individual or individuals as part of an effort to coerce the civilian population of the United States or to influence the policy or affect the conduct of the United States government by coercion.
- e. The act must cause at least \$5,000,000 in overall insured losses attributable to all types of insurance subject to the Act.
- f. The Federal Government will pay based on formula established by law; 85% through 2015, 84% 2016; 83% 2017; 82% 2018; 81% 2019 and 80% 2020, but no more than 100 billion dollars. The carrier’s maximum payment is 100 billion dollars in total for all losses.

No act may be certified as an act of terrorism if the act is committed as part of the course of a war declared by Congress (except for Workers’ Compensation) or if losses resulting from the act, in the aggregate for insurance subject to TRIA. do not exceed \$5.000.000.

IMPORTANT DECLARATION AND DISCLOSURE INFORMATION

This document and the information contained herein is designed in a format that is easy to understand and compare against previous insurance programs. As such, it is necessary to use generalized terminology. This document does not in any way confirm that coverage is, or will be, in effect. Coverage can only commence after your request for coverage is accepted by the insurance company, and a deposit premium has been received. This proposal does not in any way infer or suggest that coverage as proposed will be broader than the standard forms provided by the quoted insurance company unless the broadening features are specifically mentioned in writing in this format. The presenter of this proposal has no authority to broaden or infer coverages beyond those that are stated in writing. This proposal is only valid for 30 days.

This proposal is a summary of terms and conditions proposed by the insurers based on the information obtained from you. Therefore, you are solely responsible for the accuracy of the information furnished to the insurance carriers. We are not responsible for verifying any of this information which you have provided, nor shall we have any liability that arises from the inaccuracy of the information which you provided. All changes in your exposures to loss should be reported to us immediately so that proper coverage may be affected.

The policy must be reviewed for all of the coverages, terms, conditions, and exclusions. Policy forms will be made available at your request. The issued policy will supersede this proposal.

Upon acceptance of this proposal, it is necessary to effect insurance with proper values. Reviewing each of the coverages proposed and making changes and updates in accordance with current information and conditions is recommended. Higher limits may be available upon request.

It is important to note that any requests that you make, regarding this proposal or into the future, to change or bind your insurance coverage through email, voicemail or verbally with our staff will not take effect until written notice is received from us.

Any advice or guidance provided by any of our staff shall not be construed or relied upon as legal, accounting or actuarial advice. We encourage you to work with other professionals in those specific areas and for those specific matters.

Please also note that many insurance carriers have very strict claim reporting terms and conditions and can include wording that restricts or negates coverage should the carrier not be immediately notified of a potential claim. It is important that you refer to your actual policies for these requirements and follow them closely.

Compensation

For the placement and service of your insurance program, we will receive commission-based compensation from selected insurance companies and/or wholesale intermediaries. The compensation received by us may differ depending on the product and the insurance company. We may receive additional contingent compensation from these insurance companies based upon other aggregate factors, such as claims experience, growth in new business, retention of the business, total premium volume placed, etc. We may also be reimbursed for services rendered under contract with selected premium finance companies that agree to finance your insurance premiums. Any additional fees in lieu of commissions or for services such as claims, loss control and general risk management, will be outlined in the proposal.

Data Protection and Use

We are committed to protecting the privacy of your personal data. In our role as an insurance broker, we may use the data you provided us in the process of securing quotes or coverage, claims management, typical policy servicing, etc. and that data may be provided to various insurance carriers or intermediaries. If you have any specific questions about the use or access to this data, please let us know and we would be happy to discuss it with you.

With respect to your logo(s) and unless otherwise instructed by you, we may, without notice or consent, use your logo(s) and other publicly available information in our marketing efforts and materials with the intent of adding additional clients and growing our business.

Insurance Carrier Rating

If we have provided information in the proposal as to the current rating of an insurance carrier through the AM Best Company, which is an independent rating company, please understand that to the best of our ability we are providing their current rating as of the date of the proposal. However, these ratings are subject to change at any time. Therefore, if the rating of the carrier is important to you or your business, we advise that you check the current rating by accessing their website directly at ambest.com for the most current status and rating of your insurance carrier.



IMPORTANT NOTICE:

- 1. The insurance policy that you are applying to purchase is being issued by an insurer that is not licensed by the State of California. These companies are called "nonadmitted" or "surplus line" insurers.**
- 2. The insurer is not subject to the financial solvency regulation and enforcement that apply to California licensed insurers.**
- 3. The insurer does not participate in any of the insurance guarantee funds created by California law. Therefore, these funds will not pay your claims or protect your assets if the insurer becomes insolvent and is unable to make payments as promised.**
- 4. The insurer should be licensed either as a foreign insurer in another state in the United States or as a non-United States (alien) insurer. You should ask questions of your insurance agent, broker, or "surplus line" broker or contact the California Department of Insurance at the toll-free number 1-800-927-4357 or internet website www.insurance.ca.gov. Ask whether or not the insurer is licensed as a foreign or non-United States (alien) insurer and for additional information about the insurer. You may also visit the NAIC's internet website at www.naic.org. The NAIC-the National Association of Insurance Commissioners-is the regulatory support organization created and governed by the chief insurance regulators in the United States.**
- 5. Foreign insurers should be licensed by a state in the United States and you may contact that state's department of insurance to obtain more information about that insurer. You can find a link to each state from this NAIC internet website: https://naic.org/state_web_map.htm.**

6. For non-United States (alien) insurers, the insurer should be licensed by a country outside of the United States and should be on the NAIC's International Insurers Department (IID) listing of approved nonadmitted non-United States insurers. Ask your agent, broker, or "surplus line" broker to obtain more information about that insurer.

7. California maintains a "List of Approved Surplus Line Insurers (LASLI)." Ask your agent or broker if the insurer is on that list, or view that list at the internet website of the California Department of Insurance: www.insurance.ca.gov/01-consumers/120-company/07-

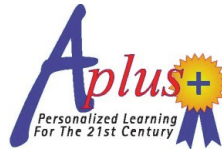
8. If you, as the applicant, required that the insurance policy you have purchased be effective immediately, either because existing coverage was going to lapse within two business days or because you were required to have coverage within two business days, and you did not receive this disclosure form and a request for your signature until after coverage became effective, you have the right to cancel this policy within five days of receiving this disclosure. If you cancel coverage, the premium will be prorated and any broker's fee charged for this insurance will be returned to you.

Signature

Date: _____

Insured: Excel Academy Charter Schools

D-1 (Effective January 1, 2020)



the Association of Personalized Learning Schools & Services

Every Child's Learning is Personal

APLUS+ Network Conference 2023

Overview For Attendees & Presenters

Deadline for Early Registration: September 1st, 2023



Our 20th Annual APLUS+ Network Conference

***Personalized Learning:
The Pinnacle of Flex-Based Instruction***

**Monday October 23rd—Wednesday, October 25th, 2023
Sheraton Grand Sacramento Hotel
Sacramento, California**



APLUS+ Network Conference 2023 Overview

Welcome to our 20th annual APLUS+ Network Conference 2023! Twenty years of APLUS+ conferences are ample reason to come together in Sacramento and celebrate!

After twenty+ years of enduring the misguided and misleading statutory term known as “nonclassroom-based instruction” (NCB), this year we are pivoting from defense to offense. Our goal is to turn the tide from the negative to the positive by affirming who we are in the public charter school segment as flex-based Personalized Learning Public Charter Schools. In so doing, we seek to foster greater clarity and understanding among those outside our segment. The problematic NCB term has been an albatross around our necks. The ongoing confusion and misunderstanding



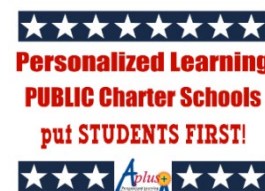
around this term among lawmakers and policymakers have resulted in harmful policy decisions that continue to disadvantage the more than 200,000 largely challenged and marginalized students in our segment. These consequences have created unjustified inequities among public education students, including numerous exclusions from state school facilities subsidy programs, the moratorium on the establishment of new flex-based charter schools, and more recently, exclusions from enrollment growth and hold harmless funding provisions. It’s time we stand united to affirm who we are as public charter schools all founded upon flexibility and send a strong message that we reject continuing to be wrongly labeled by what we are not with a derogatory, negative, and disrespectful term. It’s time to call in the F.B.I.!

Our APLUS+ Network conference annual theme this year is **“Personalized Learning: The Pinnacle of Flex-Based Instruction”**. Though all public charter schools within our segment are united by our ability to create diverse and innovative models by leveraging varying degrees of flexibility, the pinnacle of flexibility among these models is Personalized Learning. Our Personalized Learning model not only proved resilient and highly adaptable to the unforeseen and unprecedented circumstances through the recent pandemic, which by contrast, forced the long-term closure of the majority of classroom-only models, our model also proved successful in advancing our students to greater academic achievement and preventing learning losses that many students in classroom-only models experienced.



Just two years ago we had miraculously survived perhaps the most extreme attack ever by our adversaries against the very heart and foundation of our Personalized Learning model, who shamelessly engaged in false and misleading talking points to try to misguide lawmakers into voting for harmful policies that would have severely undermined our flexibility. Our steadfastness in our commitment to our Personalized Learning students through all challenges, attacks and threats remains firmly rooted in the highest standards of integrity, transparency, accountability, and academic excellence.

Our dedication and commitment to these highest standards in serving our students, our schools, and our Personalized Learning model and movement have yielded tremendous and very positive student academic growth achievement. According to our latest APLUS+ network statewide data reports, our Personalized Learning students have demonstrated significant positive growth results on statewide indicators during the period from 2018-19 through 2021-22 in both ELA and Math, compared to similar students in traditional public schools who suffered significant learning losses in both ELA and Math. Congratulations! Let us celebrate together our student data achievement successes within our Personalized Learning model and movement.



Recent surveys reveal that parents in growing numbers are becoming more enlightened about the need for and benefits of a more flexible, adaptable and student-centered education delivery model like Personalized Learning for their children. Given the heightened social, mental, and behavioral challenges we are enduring as we enter the post-pandemic era, parents seek to play a much more active role in their children’s education, as well as wanting to ensure for their children a safer environment and more engaging education experience. As the enthusiasm spreads highlighting the many benefits of our Personalized Learning and other flex-based instructional models, more parents are choosing to exit the more rigid, traditional classroom-only model. APLUS+ member schools and our Personalized Learning model are pioneering the path to what high quality and flexible education delivery should be in the 21st century for the growing number of students for whom a rigid, conformity-based, institution-centric model is not a good match for their academic success.

APLUS+ Network Conference 2023 Highlights



Who Attends APLUS+ Network Conferences?

We estimate that our 2023 conference will welcome between 300-400 attendees. Typically, APLUS+ Network conferences attract a high percentage of both educational and administrative decision-makers who are either on the leading edge of providing an innovative, Personalized Learning model for their students, or who are interested in developing a more flex-based and personalized model for their schools. The majority of our attendees represent California public charter schools that are firmly rooted in flex-based instruction.

Professional Development Workshops, Breakout Sessions, and Networking

APLUS+ Conference 2023 workshops, breakout sessions, and networking discussions will be tailored specifically to the needs and interests of key school decision-makers and stakeholders, including Board Members, CEO's, Directors, Site Administrators, CFOs, Curriculum Coordinators and Developers, Counselors, Technology Specialists, Mentor Teachers, Teacher Guides, CTE, Special Education and Special Needs Teachers, and more. Proposed topics may include but not be limited to:

- **Administrative Leadership**
- **Advocacy Strategies, Community Relations, & Outreach Successes**
- **Assessment & Accountability Strategies for Personalized Learning**
- **Compliance, Financial, and Legal Issues in the "New Era"**
- **Data Collection, Analysis, & Reporting Strategies**
- **Instructional Strategies for Achievement**
- **Preparing Students for Their Goals in Life**
- **Specialized Programs for Personalized Learning Students**
- **Preferred Partner Training Sessions**



A TOTAL OF 10 OR MORE TWO-HOUR INTENSIVE WORKSHOPS!

To kick off our 2023 conference we will offer at least 10 two-hour in-depth workshops on Monday afternoon, October 23rd. Workshop proposals may be submitted by a single presenter, a panel of presenters, or a discussion facilitator seeking to offer a more in-depth exploration in a particular topic area of interest.

MORE THAN 40 BREAKOUT SESSIONS COVERING YOUR MOST CRITICAL AREAS OF INTEREST!

Over the course of a day and a half throughout Tuesday and Wednesday morning of the conference, APLUS+ will be offering more than 40 one-hour and fifteen-minute breakout sessions and networking discussions. Breakout sessions proposals may be submitted by a single presenter, a panel of presenters, or a roundtable discussion facilitator in your area of expertise.

SHERATON GRAND BALLROOM SPOTLIGHT SESSIONS!

Continuing with our great success from last year's conference, the 2023 APLUS+ Conference will again feature several key spotlight sessions in our main ballroom, including our annual Leadership Forum panel and our panel of 2023 California Distinguished School award winners!

SUBMIT YOUR WORKSHOP/BREAKOUT SESSION PROPOSAL BY AUGUST 31, 2023.

Share your expertise, best practices, and enthusiasm with your fellow colleagues! Access the following link online to complete and submit your workshop, breakout session or networking discussion proposal no later than August 31, 2023:

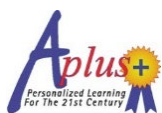


<https://aplusnetwork.wufoo.com/forms/mufe2b818vet8x/>

APLUS+ Conference 2023 Presenter Bonuses

As always, the strength and success of our annual conference is predicated on the willingness of our members to share their expertise and best practices with their fellow members. Plan to share your wealth of knowledge and experience during our 2023 conference, and in heartfelt appreciation for your willingness to share your expertise and best practices with your fellow members and conference attendees, you will receive a:

- ✓ **10% Discount on Conference Registration Fee**
- ✓ **Special Presenter Appreciation Gift**
- ✓ **Second Entry in Our Signature Bon Voyage "Have Your Cake & Eat It Too" Farewell Reception and Drawing**



APLUS+ Network Conference 2023 Sponsors, Preferred Partners & Exhibitors Personalized Learning: The Pinnacle of Flex-Based Instruction

Our 2023 APLUS+ Conference will welcome more than 30+ APLUS+ Conference Sponsors, APLUS+ Network Preferred Partners and affiliate resource providers and exhibitors. These quality companies offer a wide variety of products and services that are designed to enhance and support Personalized Learning public charter schools. Our conference exhibitor services typically include a wide variety of single subject courses that may be delivered either online or in person, curriculum, and other education-based products and services, as well as back-office, legal, financial, community relations, advocacy, and other consulting services.

Our member schools are committed to partner with several high quality, outside providers to assist them in their Personalized Learning mission and vision, and in their commitment to high standards of academic excellence and to fiscal and operational accountability. Many APLUS+ Preferred Partners will also provide on-site training opportunities for attendees to learn more about their high-quality products and services.



APLUS+ Conference 2023 Receptions & Bon Voyage Farewell Drawing

Our APLUS+ Conference 2023 Monday evening kick-off welcome reception will take place in the Sheraton Grand foyer and Gardenia ballroom immediately following our first afternoon of intensive workshops and will feature tasty hors d'oeuvres and drinks. As is our tradition, APLUS+ will treat you to your first beverage to help jump-start your reception experience. Our kick-off reception offers a great opportunity for us all to wind down and relax and chat after our first conference day and celebrate Diane's birthday!

Our APLUS+ Conference 2023 Tuesday evening reception will again take place in the Sheraton Grand foyer and Gardenia ballroom immediately following our first afternoon of intensive workshops and will feature tasty hors d'oeuvres and drinks with your first beverage of choice again on us! Wet your whistle and whet your appetite before heading out on the town for dinner.



On Wednesday morning following our morning breakout sessions, we will once again bid our conference attendees a fond farewell with our ever popular, signature Bon Voyage "Have Your Cake & Eat It Too" Farewell Reception and Drawing. Go out in style with a smile and a shot of caffeine and a variety of tasty treats. Experience the thrill of anticipation as you await anxiously on the edge of your seat to see if your name will be called above all others. Plan to stay for this exciting conference conclusion for your chance to win one of several very cool prizes!

APLUS+ Conference 2023 Schedule at a Glance

Monday, October 23rd

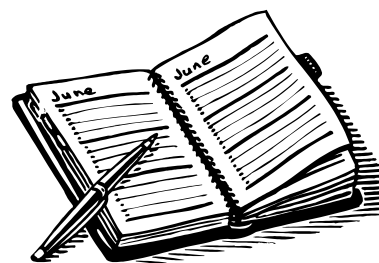
Registration Check-In	10:00 am—5:30 pm
Coffee and Welcome Snacks	10:00 am—12:30 pm
Workshops I	12:30 pm—2:30 pm
Refresher Break	2:30 pm—3:00 pm
Workshops II	3:00 pm—5:00 pm
APLUS+ Welcome Reception	5:30 pm—6:30 pm
MONDAY DINNER ON YOUR OWN	

Tuesday, October 24th

Registration Check-In/Breakfast	7:30 am-9:00 am
APLUS+ Preferred Partner Exhibits	7:30 am-5:30 pm
APLUS+ State of the Movement Address	8:00 am-8:45 am
APLUS+ Pioneer Awards Ceremony	8:45 am-9:15 am
Breakout Sessions I	9:30 am-10:45 am
Breakout Sessions II	11:00 am-12:15 pm
LUNCH/Keynote Address	12:15 pm-1:45 pm
Conference Exhibitor Networking	1:45 pm-2:45 pm
Breakout Sessions III	2:45 pm-4:00 pm
Breakout Session IV	4:15 pm-5:30 pm
APLUS+ Evening Reception	5:30 pm—6:30 pm
TUESDAY DINNER ON YOUR OWN	

Wednesday, October 25th

Registration Check-In/Breakfast	7:30 am-8:30 am
APLUS+ Preferred Partner Exhibits	7:30 am-11:30 am
Breakout Sessions V	8:30 am-9:45 am
Breakout Sessions VI	10:00 am-11:15 am
Bon Voyage Farewell Reception/Drawing	11:30 am-12:00 pm
Conference concludes	12:00 pm





Registering Attendees for the 20th Annual APLUS+ Network Conference 2023 Personalized Learning: The Pinnacle of Flex-Based Instruction

APLUS+ Conference 2023 Registration Instructions

To register for the 20th annual APLUS+ Network Conference 2023, please complete the online registration form here:

<https://aplusnetwork.wufoo.com/forms/m1kilj3m1rbd4qn/>

Each online registration form can accommodate up to 15 attendees from a single organization. For more than 15 attendees, simply fill out additional forms. Advance registration and payment only. APLUS+ does not offer onsite conference registration.

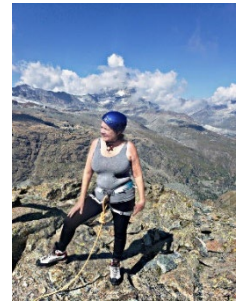
APLUS+ Network Conference 2023 Registration Fees*

For APLUS+ Members (including Preferred Partners):

- Early Full-Conference Registration for Members by 9/1/23-\$699 ea.
- Late Full-Conference Registration for Members by 10/6/23-\$849 ea.
- Early One-Day Conference Registration for Members by 9/1/23-\$499 ea.
- Late One-Day Conference Registration for Members by 10/6/23-\$649 ea.

For Non-APLUS+ Members (including non-member Exhibitors):

- Early Full-Conference Registration for Non-Members by 9/1/23-\$799 ea.
- Late Full-Conference Registration for Non-Members by 10/6/23-\$949 ea.
- Early One-Day Conference Registration for Non-Members by 9/1/23-\$599 ea.
- Late One-Day Conference Registration for Non-Members by 10/6/23-\$749 ea.



Reaching the pinnacle!

**APLUS+ gratefully offers a 5% discount to organizations registering 5 or more attendees, and a 10% discount to organizations registering 10 or more attendees.*

All presenters receive a 10% discount plus double the chance to win a fabulous prize in our farewell drawing! (Discounts for presenters and multiple attendees may not be combined)

APLUS+ Conference Early Registration Deadline is Friday, September 1st, 2023

APLUS+ Conference 2023 Hotel Room Reservations

APLUS+ Conference 2023 Sheraton Grand Sacramento Hotel Room Reservations: SOLD OUT

APLUS+ Conference 2023 Overflow Hotels

OPTION 1: Residence Inn Downtown Sacramento at Capitol Park

1121 15th Street Sacramento, California 95814

The Residence Inn Downtown Sacramento at Capitol Park features upscale, spacious suites with full kitchens and plenty of space. It is a mere six-minute, four block walk to the Sheraton Grand Sacramento Hotel. APLUS+ has secured a conference overflow room block rate of \$252 USD per night.

Book your room reservation in one of two ways:

- 1. Click here to book your group rate APLUS+ Network 20th Annual Conference**
- 2. Guests can also call reservations to book by mentioning APLUS+ Conference 2023. 1-888-236-2427**

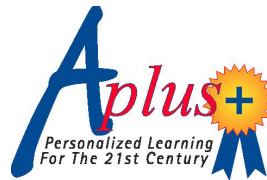
OPTION 2: Hyatt House Sacramento Midtown

2719 K Street, Sacramento, California, United States, 95816

Situated across the street from Sutter's Fort State Historic Park, the Hyatt House Sacramento Midtown offers both single bed and two bed room options for guests at \$249 and \$259 per night respectively. The Hyatt House is located about a mile (13 blocks) from the Sheraton Grand Sacramento Hotel.

Book your APLUS+ Conference 2023 room reservation at the Hyatt House here:

[Hyatt House| A PLUS](#)



APLUS+ Conference 2023 Policies

COVID Protocols

Though we appear to be moving past the COVID era, for the safety and comfort of all our conference guests, APLUS+ will honor and abide by whatever COVID-related safety protocols may still be in effect in October 2023 that may be mandated either by the state, region or Sheraton Grand Sacramento Hotel.

Wellness Support

Our wellness support table that we established during our APLUS+ Network Conferences in 2021 and 2022 APLUS+ Conferences was very well received and very much appreciated. Though we are moving past the COVID era, APLUS+ will continue to help support the well-being of all conference 2023 attendees with an assortment of daily immune-boosting vitamin supplements, pocket-sized hand sanitizers, and face masks who request them.

Registrations

Our APLUS+ online registration form: <https://aplusnetwork.wufoo.com/forms/m1kij3m1rbd4qn/> can accept up to 15 attendees from each organization. For more than 15 attendees, simply fill out one or more additional registration forms online as needed. Our early registration deadline is Friday, September 1st, 2023, and registration forms and payment must be received by this deadline to take advantage of the early registration discount. All conference registrations must be completed and received in advance of the conference and are due no later than Friday, October 6th, 2023. There will be no onsite registration services available.

Substitutions

Unpredictable and unanticipated circumstances always occur that necessitate last-minute changes in who is able to attend our conference. Therefore, substitutions for registered attendees are welcome as needed and will be honored until Friday, October 13th, 2023 by 5:00 pm.

Cancellations and Refunds

If a school or organization must cancel one or more registrations outright, a full refund of an attendee's conference fee will be given if notification of the attendee's cancellation and a request for a refund is submitted in writing no later than Friday, September 29th, 2023, by 5:00 pm PDT. Due to our annual requirement to front the majority of costs for materials, food, and other conference related fees for each attendee well in advance of the conference date, refunds are not available for any cancellation notice and refund request submitted after September 29, 2023. Unfortunately, we are unable to refund conference sponsorship fees due to late cancellations.

Invoices

Our APLUS+ conference registration policy is to issue and send invoices for conference registrations only upon request. **PLEASE NOTE: If you require an invoice for processing conference payment, PLEASE REQUEST IT IN ADVANCE ON THE ONLINE REGISTRATION FORM AT THE TIME YOU SUBMIT YOUR CONFERENCE REGISTRATIONS!** For those requesting invoices, a purchase order number is much appreciated along with your conference registration form for reference on your conference invoice, as well as the email address of the individual to whom the invoice should be sent.

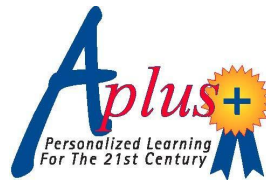
Payments

Schools or organizations with more than one representative attending may submit one payment to cover fees for all attendees. Please make checks payable to APLUS+. APLUS+ can accept direct credit card payments online via Paypal. On your online conference registration form, please indicate if you would like to make payment via Paypal and a Paypal invoice will be emailed to you. Payments must be received in advance of the conference and are due no later than Friday, October 13th, 2023.

Late Payments

All payments must be received in advance of the conference and are due no later than Friday, October 13th, 2023. Payments that are not received prior to the beginning of the conference will be subject to a 10% late fee based on the total amount due.





the Association of Personalized Learning Schools & Services

Every Child's Learning is Personal

Jeff Rice, Director
18820 Lodestone Court, Penn Valley, CA. 95946
Voice: 530-432-3609; Fax: 530-432-3610; Email: jeffrice@jps.net; Web: www.theaplus.org

INVOICE
#08242301

Date: August 24, 2023

To:
Lauren Hansen
Excel Academy
1 Technology Drive, Ste. I-811
Irvine, CA. 92618

Amount Due: \$5,976.45
(The sum five thousand nine hundred seventy-six dollars and fifty-five cents)

For 9 APLUS+ Conference 2023 full registrations @ \$699 each	\$6,291.00
Less 5% quantity discount	<u><314.55></u>
TOTAL DUE	\$5,976.45

Reference: 267472030

Terms:
Payment is due upon receipt

Please make check payable to APLUS+

Cash Requirements Statement**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: DF1CB567B

Period Ending: 08/15/2023

Check Date: 08/25/2023

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/24/2023

*A wire request for \$28,259.20 will be sent to your bank on 08/23/2023***Items**

Checks / Vouchers	16
Additional Direct Deposit Accounts	1

Billing

Check Processing/Tax Service	513.01
Direct Deposit	7.25
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	No Charge
Total Billing	<u>526.26</u>

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,429.51	1,429.51	2,859.02
Medicare	386.10	386.10	772.20
Federal W/H Tax	1,594.59		1,594.59
FUTA		4.14	4.14
California ETT Qtrly		0.46	0.46
California SDI-Semiweekly	244.65		244.65
California SUTA		10.13	10.13
California W/H SemiWeekly	699.18		699.18
Total Tax Deposits	<u>4,354.03</u>	<u>1,830.34</u>	<u>6,184.37</u>

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	19,958.22
Direct Deposit Distribution - Paycom Pay	1,590.35
Taxes - PAYCOM Resp.	6,184.37
Payroll Fee	526.26
Total Paycom Cash Requirements	<u>28,259.20</u>

Total Cash Requirements28,259.20

Cash Requirements Statement**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: 529E8CE7A

Period Ending: 08/31/2023

Check Date: 08/25/2023

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/24/2023

*A wire request for \$771,546.03 will be sent to your bank on 08/23/2023***Items**

Checks / Vouchers	109
Additional Direct Deposit Accounts	10

Billing

Check Processing/Tax Service	1,663.69
Direct Deposit	9.50
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	10.00
Total Billing	<u>1,689.19</u>

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	4,722.28	4,722.28	9,444.56
Medicare	12,324.35	12,324.35	24,648.70
Federal W/H Tax	69,627.91		69,627.91
FUTA		233.35	233.35
California ETT Qtrly		25.93	25.93
California SDI-Semiweekly	7,554.68		7,554.68
California SUTA		570.40	570.40
California W/H SemiWeekly	33,568.13		33,568.13
Hawaii W/H Semiweekly	845.59		845.59
Total Tax Deposits	<u>128,642.94</u>	<u>17,876.31</u>	<u>146,519.25</u>

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	603,684.16
Direct Deposit Distribution - Paycom Pay	19,653.43
Taxes - PAYCOM Resp.	146,519.25
Payroll Fee	1,689.19
Total Paycom Cash Requirements	<u>771,546.03</u>

Other Cash Requirements

Manual Checks	3,820.54
Total Other Cash Requirements	<u>3,820.54</u>

Total Cash Requirements775,366.57

Cash Requirements Statement

EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 529E8CE7A

Period Ending: 08/31/2023

Check Date: 08/25/2023

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/24/2023

A wire request for \$771,546.03 will be sent to your bank on 08/23/2023



Cash Requirements Statement**COMMUNITY COLLABORATIVE CHARTER SCH**

Transaction #: D63F690AA

Period Ending: 06/30/2023

Check Date: 07/10/2023

Client: 0BK94

EIN: 47-4121751

PAYCOM Impound Date: 07/10/2023

*A wire request for \$28,190.34 will be sent to your bank on 07/07/2023***Items**

Checks / Vouchers	16
Additional Direct Deposit Accounts	1

Billing

Check Processing/Tax Service	517.89
Direct Deposit	7.25
Jurisdiction Filing	42.00
Garnishment Fee this Payroll	No Charge
Additional Services	578.68
Total Billing	1,145.82

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,562.01	1,562.01	3,124.02
Medicare	419.67	419.67	839.34
Federal W/H Tax	2,455.10		2,455.10
California W/H Next Day	935.01		935.01
California SDI Next Day	263.58		263.58
California ETT Qtrly		1.29	1.29
California SUTA		28.39	28.39
Total Tax Deposits	5,635.37	2,011.36	7,646.73

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	17,923.55
Direct Deposit Distribution - Paycom Pay	1,474.24
Taxes - PAYCOM Resp.	7,646.73
Payroll Fee	1,145.82
Total Paycom Cash Requirements	28,190.34

Other Cash Requirements

Manual Checks	3,386.63
Total Other Cash Requirements	3,386.63

Total Cash Requirements**31,576.97**

Cash Requirements Statement**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: 657071C2A

Period Ending: 07/31/2023

Check Date: 08/10/2023

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/09/2023

*A wire request for \$24,863.38 will be sent to your bank on 08/08/2023***Items**

Checks / Vouchers	10
Additional Direct Deposit Accounts	1

Billing

Check Processing/Tax Service	438.88
Direct Deposit	7.25
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	No Charge
Total Billing	<u>452.13</u>

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,423.98	1,423.98	2,847.96
Medicare	332.99	332.99	665.98
Federal W/H Tax	1,443.53		1,443.53
California SDI-Semiweekly	211.63		211.63
California W/H SemiWeekly	598.31		598.31
Total Tax Deposits	<u>4,010.44</u>	<u>1,756.97</u>	<u>5,767.41</u>

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	17,053.49
Direct Deposit Distribution - Paycom Pay	1,590.35
Taxes - PAYCOM Resp.	5,767.41
Payroll Fee	452.13
Total Paycom Cash Requirements	<u>24,863.38</u>

Total Cash Requirements24,863.38

Cash Requirements Statement**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: C4059B6AD

Period Ending: 08/25/2023

Check Date: 08/25/2023

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/24/2023

*A wire request for \$586,351.94 will be sent to your bank on 08/23/2023***Items**

Checks / Vouchers	103
Additional Direct Deposit Accounts	10

Billing

Check Processing/Tax Service	1,498.71
Direct Deposit	9.50
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	10.00
Total Billing	1,524.21

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	2,526.55	2,526.55	5,053.10
Medicare	8,845.19	8,845.16	17,690.35
Federal W/H Tax	126,160.32		126,160.32
California SDI-Semiweekly	5,393.06		5,393.06
California W/H SemiWeekly	37,192.88		37,192.88
Hawaii W/H Semiweekly	672.82		672.82
Total Tax Deposits	180,790.82	11,371.71	192,162.53

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	378,061.43
Direct Deposit Distribution - Paycom Pay	14,603.77
Taxes - PAYCOM Resp.	192,162.53
Payroll Fee	1,524.21
Total Paycom Cash Requirements	586,351.94

Total Cash Requirements**586,351.94**

Cash Requirements Statement**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: D3C7E7AE3

Period Ending: 08/25/2023

Check Date: 08/25/2023

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/24/2023

*A wire request for \$43,744.11 will be sent to your bank on 08/23/2023***Items**

Checks / Vouchers	19
Additional Direct Deposit Accounts	1

Billing

Check Processing/Tax Service	459.23
Direct Deposit	7.25
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	No Charge
Total Billing	<u>472.48</u>

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,782.42	1,782.42	3,564.84
Medicare	601.83	601.84	1,203.67
Federal W/H Tax	8,984.66		8,984.66
FUTA		10.65	10.65
California ETT Qtrly		1.62	1.62
California SDI-Semiweekly	373.55		373.55
California SUTA		35.74	35.74
California W/H SemiWeekly	2,695.40		2,695.40
Total Tax Deposits	<u>14,437.86</u>	<u>2,432.27</u>	<u>16,870.13</u>

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	24,550.00
Direct Deposit Distribution - Paycom Pay	1,851.50
Taxes - PAYCOM Resp.	16,870.13
Payroll Fee	472.48
Total Paycom Cash Requirements	<u>43,744.11</u>

Total Cash Requirements43,744.11

Cash Requirements Statement**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: FC17CF5EF

Period Ending: 07/31/2023

Check Date: 07/26/2023

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 07/25/2023

*A wire request for \$183,057.50 will be sent to your bank on 07/24/2023***Items**

Checks / Vouchers	35
Additional Direct Deposit Accounts	5

Billing

Check Processing/Tax Service	747.89
Direct Deposit	8.25
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	No Charge
Total Billing	<u>762.14</u>

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	3,768.81	3,768.80	7,537.61
Medicare	2,869.68	2,869.67	5,739.35
Federal W/H Tax	18,872.58		18,872.58
California SDI-Semiweekly	1,681.68		1,681.68
California W/H SemiWeekly	7,691.14		7,691.14
Hawaii W/H Semiweekly	845.59		845.59
Total Tax Deposits	<u>35,729.48</u>	<u>6,638.47</u>	<u>42,367.95</u>

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	128,145.73
Direct Deposit Distribution - Paycom Pay	11,781.68
Taxes - PAYCOM Resp.	42,367.95
Payroll Fee	762.14
Total Paycom Cash Requirements	<u>183,057.50</u>

Total Cash Requirements183,057.50

Cash Requirements Statement**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: EC4034BD2

Period Ending: 07/15/2023

Check Date: 07/26/2023

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 07/25/2023

*A wire request for \$22,107.09 will be sent to your bank on 07/24/2023***Items**

Checks / Vouchers	13
Additional Direct Deposit Accounts	1

Billing

Check Processing/Tax Service	475.94
Direct Deposit	7.25
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	No Charge
Total Billing	<u>489.19</u>

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,272.49	1,272.47	2,544.96
Medicare	298.68	298.62	597.30
Federal W/H Tax	1,134.91		1,134.91
California SDI-Semiweekly	191.87		191.87
California SUTA		0.01	0.01
California W/H SemiWeekly	449.52		449.52
Total Tax Deposits	<u>3,347.47</u>	<u>1,571.10</u>	<u>4,918.57</u>

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	15,250.63
Direct Deposit Distribution - Paycom Pay	1,448.70
Taxes - PAYCOM Resp.	4,918.57
Payroll Fee	489.19
Total Paycom Cash Requirements	<u>22,107.09</u>

Other Cash Requirements

Manual Checks	70.66
Total Other Cash Requirements	<u>70.66</u>

Total Cash Requirements22,177.75

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

Bank	Account no.	Bill date	Bill no.	Vendor	GL account or account label	Document no.	Amount	Amount applied	Cleared	Memo	Department	Location
CHASE 9313 - Chase Bank	215769313											
	6/1/2023	6/1/2023	5050-053123	5050--Berkshire Hathaway Homestate Compan 5050--Berkshire Hathaway Homestate Compan 5050--Berkshire Hathaway Homestate Compan 5050--Berkshire Hathaway Homestate Compan	3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments		5,281.39 5,281.39 5,281.39 5,281.39	765.61 2,720.10 1,401.28 394.42	6/30/2023 6/30/2023 6/30/2023 6/30/2023	mp - Chargeable Wages for MPR ending 05.31.23 mp - Chargeable Wages for MPR ending 05.31.23 mp - Chargeable Wages for MPR ending 05.31.23 mp - Chargeable Wages for MPR ending 05.31.23	000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
	6/1/2023	5/26/2023	5034-052623	5034--April Saade 5034--April Saade	9521--Accrued Salary & Wages 9521--Accrued Salary & Wages	0601B10GC016300 0601B10GC016300	6,129.83 6,129.83	2,084.14 4,045.69	6/30/2023 6/30/2023		000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Warner
	6/2/2023	6/2/2023	5795-060223	5795--BRMS - FSA 5795--BRMS - FSA	9516--Voluntary FSA 9516--Voluntary FSA		50.00 50.00	33.00 17.00	6/30/2023 6/30/2023		000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
	6/2/2023	4/11/2023	81057	3167--Wiseca Biomes	4310--Materials & Supplies	Voided - 10136005370	-407.00	-407.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/2/2023	4/4/2023	9022	2454--Memory Joggers	4310--Materials & Supplies	Voided - 10136005251	-74.60	-74.60	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	6/5/2023	5795-060423	5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA	9516--Voluntary FSA 9516--Voluntary FSA 9516--Voluntary FSA 9516--Voluntary FSA		617.43 617.43 617.43 617.43	191.97 34.85 17.95 372.66	6/30/2023 6/30/2023 6/30/2023 6/30/2023		000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	6/5/2023	4/4/2023	9022	2454--Memory Joggers	4310--Materials & Supplies	10136005804	74.60	74.60	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	6/1/2023	B-267500467	5539--Alex Nguyen Tennis	5880--Instructional Vendors &	10136005752	105.00	105.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/18/2023	125290	5297--Learning Ally 5297--Learning Ally	5895--Professional Development 5895--Professional Development	10136005753 10136005753	99.00 99.00	65.34 33.66	6/30/2023 6/30/2023		907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
	6/5/2023	5/30/2023	B-267500491	v3022--Fired Up Arts	5880--Instructional Vendors &	10136005763	98.00	98.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	6/1/2023	B-267500490	1615--Esther Btl	5880--Instructional Vendors &	10136005785	75.00	75.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/16/2023	B-267499474	5962--Bright Star Learners Academy, LLC	5880--Instructional Vendors &	10136005789	55.50	55.50	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/31/2023	49545	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	10136005754	45.95	45.95	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/4/2023	4424062	1156--Barnes and Noble	4100--Textbooks & Core Curricu	10136005782	36.18	36.18	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/31/2023	B-267500498	2113--Alison Maitten	5880--Instructional Vendors &	10136005776	35.00	35.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/22/2023	842808	5059--Blick Art Material	4310--Materials & Supplies	10136005779	10.15	10.15	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/18/2023	B-267499468	4153--Beach Tutors	5880--Instructional Vendors &	10136005755	650.00	650.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/18/2023	B-267499513	2572--Focus Dance Center	5880--Instructional Vendors &	10136005793	589.80	589.80	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/25/2023	B-267499498	2192--Drawn2Art Northridge	5880--Instructional Vendors &	10136005796	569.00	569.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/22/2023	B-267499453	4130--Tigranuhi Arakelyan 4130--Tigranuhi Arakelyan	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005784 10136005784	568.00 568.00	312.00 256.00	6/30/2023 6/30/2023		910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
	6/5/2023	5/18/2023	140-INV4871	5368--School Pathways, LLC	5830--Non-Instructional Softwa	10136005778	555.00	277.50	6/30/2023		900--Operations	2053--Excel Academy Charter School - Warner
	6/5/2023	5/18/2023	140-INV4870	5368--School Pathways, LLC	5830--Non-Instructional Softwa	10136005778	555.00	277.50	6/30/2023		900--Operations	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/24/2023	B-267499168	5889--Brian Patrick	5880--Instructional Vendors &	10136005766	480.00	480.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/29/2023	B-267499482	2609--Candl Chavez	5880--Instructional Vendors &	10136005772	480.00	480.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/27/2023	B-267499507	6007--EuroGymnastics, Inc.	5880--Instructional Vendors &	10136005774	450.00	450.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	4/17/2023	405867	2134--Timberdoodle 4310--Timberdoodle	4100--Textbooks & Core Curricu 4310--Materials & Supplies	10136005750 10136005750	438.91 438.91	402.48 36.43	6/30/2023 6/30/2023		910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Warner
	6/5/2023	5/27/2023	B-267499484	4118--Kyungeun Christina Lee	5880--Instructional Vendors &	10136005759	400.00	400.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	4/4/2023	10153	1391--MovieBox Art, Inc.	4100--Textbooks & Core Curricu	10136005795	344.07	344.07	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/22/2023	B-267499508	5591--Faith Seymour Tutoring Services	5880--Instructional Vendors &	10136005746	315.00	315.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/26/2023	B-267499496	1383--Drawn2Art Chino Hills	5880--Instructional Vendors &	10136005760	310.00	310.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	6/1/2023	B-267500485	3172--Dancing Keys Music Studio LLC	5880--Instructional Vendors &	10136005769	307.80	307.80	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/26/2023	B-267500523	5742--Kumon Math and Reading Ladera Ranch	5880--Instructional Vendors &	10136005799	300.00	300.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/27/2023	B-267499504	4192--Eric Kogan	5880--Instructional Vendors &	10136005798	270.00	270.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/30/2023	B-267500494	4110--Gabrina Casillas Owen	5880--Instructional Vendors &	10136005762	260.00	260.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/12/2023	B-267499515	5820--Fundamental Chess Academy, Inc.	5880--Instructional Vendors &	10136005781	240.00	240.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/10/2023	GG177905	v3171--Generation Genius, Inc.	4100--Textbooks & Core Curricu	10136005801	225.00	225.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/1/2023	B-267494541	6049--Blossom Hill Ranch LLC	5880--Instructional Vendors &	10136005767	220.00	220.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/22/2023	6.873E+13	5601--Atkinson, Anderson, Loya, Raud & Romo 5601--Atkinson, Anderson, Loya, Raud & Romo	5895--Professional Development 5895--Professional Development	10136005792 10136005792	219.00 219.00	144.54 74.46	6/30/2023 6/30/2023		907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
	6/5/2023	5/22/2023	5_22_23A	5580--Russian School of Mathematics Irvine	5880--Instructional Vendors &	10136005783	210.00	210.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/28/2023	B-267499458	6046--Art and Design Studio	5880--Instructional Vendors &	10136005791	160.00	160.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/31/2023	B-267500488	3245--K&K Art Glendora Inc.	5880--Instructional Vendors &	10136005775	160.00	160.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/28/2023	B-267499514	5838--Foundations Tutoring	5880--Instructional Vendors &	10136005770	158.00	158.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/18/2023	B-267500526	4140--Legacy of Valor & Excellence	5880--Instructional Vendors &	10136005761	150.00	150.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/24/2023	B-267499531	5883--Julia Amonette-Hinke	5880--Instructional Vendors &	10136005797	135.00	135.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/22/2023	B-267499521	5890--Jill Sturkie	5880--Instructional Vendors &	10136005751	120.00	120.00	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	6/5/2023	5/30/2023	B-267500492	5689--Floaties Swim School, LLC	5880--Instructional Vendors &	10136005748	110.00	110.00	6/30/2023		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/5/2023	5/18/2023	52173966 R	2345--Carolina Biological Supply Company	4310--Materials & Supplies	10136005747	105.40	105.40	6/30/2023		910--Instructional Funds	2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

6/12/2023	5/31/2023	B-267500477	5684-Caique Jiu Jitsu Walnut Academy	5880-Instructional Vendors &	10136005890	120.00	120.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	5/29/2023	B-267501595	4129-Write on Webb	5880-Instructional Vendors &	10136005844	118.75	118.75	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/2/2023	1439	5413-TSW Therapy, Inc.	5100-SpEd Consultants and Ven	10136005886	112.50	112.50	6/30/2023	OT Services	907-Special Education
6/12/2023	5/25/2023	B-267500774	1698-Noonan Family Swim School San Diego	5880-Instructional Vendors &	10136005916	102.00	102.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/4/2023	B-267501418	6034-Noelle Fitness	5880-Instructional Vendors &	10136005832	100.00	100.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/30/2023	B-267501403	v3137-Hector Y. Martinez	5880-Instructional Vendors &	10136005853	100.00	100.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501487	4192-Eric Kogan	5880-Instructional Vendors &	10136005915	90.00	90.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267500466	5868-Alex Flora's Textbook Tutoring	5880-Instructional Vendors &	10136005823	80.00	80.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	5/30/2023	B-267500802	3306-Rockstars of Tomorrow, Inc. - Chino H#	5880-Instructional Vendors &	10136005811	77.61	77.61	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267501393	2623-Dexter Creative	5880-Instructional Vendors &	10136005841	67.25	67.25	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/30/2023	B-267501559	5813-Susan Sanders	5880-Instructional Vendors &	10136005835	60.00	60.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/2/2023	561	5273-Kitchen Stewardship, LLC	4100-Textbooks & Core Curricu	10136005889	49.95	49.95	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501568	2267-Top Billing Entertainment Performance A	5880-Instructional Vendors &	10136005886	45.00	45.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	5/21/2023	B-267500731	5814-Mary Longbottom	5880-Instructional Vendors &	10136005827	37.00	37.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/31/2023	B-267501404	2113-Alison Mailten	5880-Instructional Vendors &	10136005881	35.00	35.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/5/2023	SI-179309	1978-The Logic of English	4100-Textbooks & Core Curricu	10136005901	23.99	23.99	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	5/30/2023	B-267500468	2083-American Martial Arts Academy Fullertor	5880-Instructional Vendors &	10136005870	219.00	219.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267501396	5699-Elite Dance Academy of Orange County	5880-Instructional Vendors &	10136005837	210.00	210.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267501155	5864-Aquatic Explorations and Safety Training 5864-Aquatic Explorations and Safety Training	5880-Instructional Vendors & 5880-Instructional Vendors &	10136005902 10136005902	208.00 208.00	104.00 104.00	6/30/2023 6/30/2023	910-Instructional Funds 910-Instructional Funds	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267501160	3015-Art Steps, Inc. Costa Mesa	5880-Instructional Vendors &	10136005847	203.00	203.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/4/2023	B-267501382	4118-Kyungeun Christina Lee	5880-Instructional Vendors &	10136005805	200.00	200.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/2/2023	B-267501443	5575-Red Dragon Karate	5880-Instructional Vendors &	10136005834	199.00	199.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/2/2023	B-267501425	3364-Pacific Ballet Conservatory	5880-Instructional Vendors &	10136005885	190.00	190.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501563	4120-The Collective Movements	5880-Instructional Vendors &	10136005875	190.00	190.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/4/2023	B-267501395	1855-Dorothy McCandiss	5880-Instructional Vendors &	10136005869	185.00	185.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	5/22/2023	B-267501449	5580-Russian School of Mathematics Irvine	5880-Instructional Vendors &	10136005919	171.00	171.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/22/2023	B-267500722	5922-Let There Be Rock School	5880-Instructional Vendors &	10136005824	169.00	169.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/8/2023	52194932 RI	2345-Carolina Biological Supply Company	4310-Materials & Supplies	10136005913	163.72	163.72	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267501154	4130-Tigranuhi Arakelyan	5880-Instructional Vendors &	10136005849	156.00	156.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267501407	2288-Kicks Taekwondo Riverside Inc.	5880-Instructional Vendors &	10136005867	150.00	150.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267501355	4153-Beach Tutors	5880-Instructional Vendors &	10136005894	150.00	150.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/12/2023	5/31/2023	2280	4212-Brainy Verse	4100-Textbooks & Core Curricu	10136005829	148.63	148.63	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/6/2023	B-267502139	5675-South OC Sports	5880-Instructional Vendors &	10136005813	142.21	142.21	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/29/2023	B-267500733	5884-Master Lee's Kung Fu San Soo	5880-Instructional Vendors &	10136005820	139.00	139.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/27/2023	B-267501552	5948-South Shore Jiu Jitsu & MMA	5880-Instructional Vendors &	10136005899	125.00	125.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/2/2023	B-267501506	5726-Silva Jiu-Jitsu Academy	5880-Instructional Vendors &	10136005864	125.00	125.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/31/2023	B-267500781	5951-Park Vocal Studio	5880-Instructional Vendors &	10136005843	382.50	382.50	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267500756	5557-Music Lessons with Jena	5880-Instructional Vendors &	10136005910	380.00	380.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/25/2023	B-267500773	1022-Noonan Family Swim School Murrieta	5880-Instructional Vendors &	10136005861	336.83	336.83	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/25/2023	EX2023.04	5400-Therapy in Action	5100-SpEd Consultants and Ven	10136005845	330.00	330.00	6/30/2023	OT Services	907-Special Education
6/12/2023	6/7/2023	B-267502141	1389-Waterworks Aquatics Irvine	5880-Instructional Vendors &	10136005842	297.50	297.50	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267500480	5677-Champion's Quest Athlete Academy	5880-Instructional Vendors &	10136005865	295.90	295.90	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/30/2023	B-267500463	3084-Marcos Moscat	5880-Instructional Vendors &	10136005904	280.00	280.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/19/2023	B-267501576	2627-Veronica Richards Violin Studio	5880-Instructional Vendors &	10136005850	229.20	229.20	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	5/11/2023	6157909	5411-Total Education Solutions	5100-SpEd Consultants and Ven	10136005810	225.00	225.00	6/30/2023	APE Services	907-Special Education
6/12/2023	5/23/2023	B-267500792	6030-Providence Heart Ranch	5880-Instructional Vendors &	10136005814	225.00	225.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501500	5493-Ronald Hoshi	5880-Instructional Vendors &	10136005816	220.00	220.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/1/2023	0137861-IN	5756-School Services of California, Inc.	5300-Dues & Memberships	10136005817	550.00	120.70	6/30/2023	900-Operations	2073-Excel Academy Charter School - Helendale
6/12/2023	5/31/2023	W129937-IN	5756-School Services of California, Inc.	5300-Dues & Memberships	10136005817	550.00	234.30	6/30/2023	900-Operations	2053-Excel Academy Charter School - Warner
6/12/2023	5/31/2023	W129937-IN	5756-School Services of California, Inc.	5895-Professional Development	10136005817	550.00	66.30	6/30/2023	901-Human Resources	2073-Excel Academy Charter School - Helendale
6/12/2023	5/31/2023	W129937-IN	5756-School Services of California, Inc.	5895-Professional Development	10136005817	550.00	128.70	6/30/2023	901-Human Resources	2053-Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267501389	6040-City of Champions	5880-Instructional Vendors &	10136005873	508.00	508.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/2/2023	B-267501520	v3029-South OC Hybrid Homeschool	5880-Instructional Vendors &	10136005822	504.00	504.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/12/2023	6/1/2023	14210	5017-Alpha Vision, Inc.	5940-Technology Services	10136005907	504.00	128.86	6/30/2023	900-Operations	2073-Excel Academy Charter School - Helendale
6/12/2023	5/16/2023	14206	5017-Alpha Vision, Inc.	5940-Technology Services	10136005907	504.00	250.14	6/30/2023	900-Operations	2053-Excel Academy Charter School - Warner
						504.00	42.50	6/30/2023	900-Operations	2073-Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

			5017--Alpha Vision, Inc.	5940--Technology Services	10136005907	504.00	82.50	6/30/2023	900--Operations	2053--Excel Academy Charter School - Warner
6/12/2023	6/3/2023	B-267501408	1928--Lorie Susan Suntree	5880--Instructional Vendors &	10136005908	500.00	100.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/31/2023	B-267500725	1928--Lorie Susan Suntree	5880--Instructional Vendors &	10136005908	500.00	400.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267501553	5487--Southland Ballet Academy	5880--Instructional Vendors &	10136005868	500.00	500.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/26/2023	B-267500790	5578--Power of Leverage Brazilian Jiu Jitsu	5880--Instructional Vendors &	10136005812	495.00	495.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/2/2023	B-267501135	5534--Academy of Ballet Arts	5880--Instructional Vendors &	10136005840	450.50	450.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501494	1869--Mad Science OF West O.C.	5880--Instructional Vendors &	10136005838	450.00	450.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/1/2023	06012023-01	5110--Code WizardsHD	4100--Textbooks & Core Curricu	10136005857	447.00	447.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267501597	v3104--Yamaha Music Academy of Fullerton	5880--Instructional Vendors &	10136005882	427.00	427.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/24/2023	B-267500753	1923--Murphy Language Arts LLC	5880--Instructional Vendors &	10136005888	422.50	285.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			1923--Murphy Language Arts LLC	5880--Instructional Vendors &	10136005888	422.50	137.50	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267500470	2180--ART Ime, LLC.	5880--Instructional Vendors &	10136005855	420.00	420.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501495	4171--Naomi Lee	5880--Instructional Vendors &	10136005909	420.00	420.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/5/2023	B-267501484	v3140--Cadenza Music Academy	5880--Instructional Vendors &	10136005879	400.00	200.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			v3140--Cadenza Music Academy	5880--Instructional Vendors &	10136005879	400.00	200.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501483	V3170--Ar Tutoring Inc.	5880--Instructional Vendors &	10136005856	396.90	396.90	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/5/2023	B-267501490	5885--Guided Creators	5880--Instructional Vendors &	10136005898	390.00	390.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/30/2023	B-267501455	5548--Sektor Jiu-Jitsu	5880--Instructional Vendors &	10136005854	386.00	241.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			5548--Sektor Jiu-Jitsu	5880--Instructional Vendors &	10136005854	386.00	146.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267501158	1849--Art Steps, Inc Yorba Linda	5880--Instructional Vendors &	10136005906	844.00	641.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			1849--Art Steps, Inc Yorba Linda	5880--Instructional Vendors &	10136005906	844.00	203.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	4/30/2023	35225	5257--Jump and Schout Therapy, Inc.	5100--SpEd Consultants and Ven	10136005833	840.00	360.00	6/30/2023	Speech Services	907--Special Education
	4/30/2023	35191	5257--Jump and Schout Therapy, Inc.	5100--SpEd Consultants and Ven	10136005833	840.00	240.00	6/30/2023	OT Services	907--Special Education
	4/30/2023	35192	5257--Jump and Schout Therapy, Inc.	5100--SpEd Consultants and Ven	10136005833	840.00	240.00	6/30/2023	Speech Services	907--Special Education
6/12/2023	6/4/2023	B-267501400	5481--Freedom in Motion Gym, LLC	5880--Instructional Vendors &	10136005828	750.00	750.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501489	5999--Gracie Barra RSM	5880--Instructional Vendors &	10136005858	718.00	718.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/31/2023	B-267500782	3109--New Modern Music School US Inc.	5880--Instructional Vendors &	10136005846	706.00	706.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267500734	12580--Math Learning Woodbridge	5880--Instructional Vendors &	10136005917	700.00	700.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/1/2023	Excel0523	2117--Thrive Academics, Inc	4100--Textbooks & Core Curricu	10136005900	700.00	700.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/31/2023	B-267501504	1551--Sierra Madre Dance Center	5880--Instructional Vendors &	10136005807	697.00	697.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	5/29/2023	B-267501565	1938--Brittany Doan	5880--Instructional Vendors &	10136005826	681.35	681.35	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501485	5970--Code Ninjas Irvine	5880--Instructional Vendors &	10136005825	665.50	87.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/30/2023	B-267500481	5970--Code Ninjas Irvine	5880--Instructional Vendors &	10136005825	665.50	299.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			5970--Code Ninjas Irvine	5880--Instructional Vendors &	10136005825	665.50	349.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/4/2023	B-267501429	1648--Portal Languages Fullerton LLC	5880--Instructional Vendors &	10136005895	656.00	656.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/30/2023	B-267501380	1107--Todd Nash	5880--Instructional Vendors &	10136005872	630.00	630.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/25/2023	B-267501599	5577--Mission Viejo Family YMCA	5880--Instructional Vendors &	10136005839	612.00	612.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/3/2023	B-267501374	2199--Burbank Music Academy	5880--Instructional Vendors &	10136005883	600.00	600.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	5/26/2023	B-267501515	1874--South County Dance Inc.	5880--Instructional Vendors &	10136005871	599.07	599.07	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/5/2023	B-267501486	2506--KidsArt Claremont Inc.	5880--Instructional Vendors &	10136005830	589.00	589.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/6/2023	B-267501603	1387--Waterworks Aquatics HB	5880--Instructional Vendors &	10136005874	582.20	582.20	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267500472	6049--Blossom Hill Ranch LLC	5880--Instructional Vendors &	10136005821	550.00	330.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	6/1/2023	B-267501356	6049--Blossom Hill Ranch LLC	5880--Instructional Vendors &	10136005821	550.00	220.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Warner
6/12/2023	5/23/2023	B-267500751	1550--Monica D Basurto	5880--Instructional Vendors &	10136005920	1,039.65	1,039.65	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/3/2023	B-267501577	4197--Victoria Knell	5880--Instructional Vendors &	10136005815	1,028.55	812.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			4197--Victoria Knell	5880--Instructional Vendors &	10136005815	1,028.55	216.05	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267501419	5532--Maestra Escuela Spanish Academy	5880--Instructional Vendors &	10136005836	1,014.50	139.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			5532--Maestra Escuela Spanish Academy	5880--Instructional Vendors &	10136005836	1,014.50	875.50	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	B-267501433	1902--Precision Gymnastics	5880--Instructional Vendors &	10136005903	1,014.00	156.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			1902--Precision Gymnastics	5880--Instructional Vendors &	10136005903	1,014.00	858.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	5/27/2023	B-267501581	4147--Kelsey Mira Slater	5880--Instructional Vendors &	10136005897	890.00	890.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/1/2023	B-267501444	5589--Rock Fitness	5880--Instructional Vendors &	10136005918	850.00	850.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/31/2023	B-267500482	4142--Code Ninjas Ladera Ranch	5880--Instructional Vendors &	10136005809	796.00	199.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			4142--Code Ninjas Ladera Ranch	5880--Instructional Vendors &	10136005809	796.00	597.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/31/2023	B-267500783	5571--PAVE School of the Arts	5880--Instructional Vendors &	10136005851	780.00	780.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	6/2/2023	B-267501156	1994--Art 4 Kids and Teens	5880--Instructional Vendors &	10136005892	772.83	772.83	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/12/2023	5/30/2023	B-267500723	5495--Little School of Music	5880--Instructional Vendors &	10136005860	772.00	772.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	5/12/2023	B-267500788	5514--Pleasant Street Stable	5880--Instructional Vendors &	10136005911	760.00	760.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	6/1/2023	2023-11098	5947--Care Solace, Inc.	9130--Prepaid Expenses	10136005862	7,500.00	2,550.00	6/30/2023	900--Operations	2073--Excel Academy Charter School - Helendale
			5947--Care Solace, Inc.	9130--Prepaid Expenses	10136005862	7,500.00	4,950.00	6/30/2023	900--Operations	2053--Excel Academy Charter School - Warner
6/12/2023	6/4/2023	B-267501405	2337--Wildcats Hockey LLC	5880--Instructional Vendors &	10136005863	4,735.38	3,295.38	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			2337--Wildcats Hockey LLC	5880--Instructional Vendors &	10136005863	4,735.38	1,440.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/12/2023	12/31/2022	10379	5197--Gallagher Pediatric Therapy	5100--SpEd Consultants and Ven	10136005876	3,624.48	1,024.92	6/30/2023	OT/PT Services and OT Evals	907--Special Education
			5197--Gallagher Pediatric Therapy	5100--SpEd Consultants and Ven	10136005876	3,624.48	2,599.56	6/30/2023	OT/PT Services and OT Evals	907--Special Education

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

6/12/2023	5/30/2023	B-267500475	v3002--Breakthrough Sports LLC v3002--Breakthrough Sports LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005806 10136005806	3,238.13 3,238.13	213.75 3,024.38	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/12/2023	5/31/2023	B-267501454	1027--Science-2 U 1027--Science-2 U	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005818 10136005818	2,906.68 2,906.68	2,192.68 714.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/12/2023	5/31/2023	B-267500797	6051--Riffs Music	5880--Instructional Vendors &	10136005878	2,900.50	2,900.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/12/2023	5/30/2023	B-267500784	v3032--Peace Hill Classical Co-op LLC v3032--Peace Hill Classical Co-op LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005852 10136005852	2,644.35 2,644.35	938.00 1,706.35	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/12/2023	5/30/2023	B-267501558	v3125--Strategic Kids LLC	5880--Instructional Vendors &	10136005884	2,574.00	2,574.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/12/2023	5/31/2023	B-267500777	4137--Olive Tree Education 4137--Olive Tree Education	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005912 10136005912	2,327.73 2,327.73	722.73 1,605.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/12/2023	4/30/2023	160173	v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	10136005848 10136005848	2,242.50 2,242.50	432.00 297.00	6/30/2023 6/30/2023	Counseling Services PT and BIS Services Counseling Services	907--Special Education 907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/12/2023	5/30/2023	B-267501598	2255--Yamaha Music School Cerritos/Chino Hill 2255--Yamaha Music School Cerritos/Chino Hill	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005905 10136005905	2,195.50 2,195.50	1,056.00 1,139.50	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/12/2023	5/30/2023	B-267501448	2107--Rockstars of Tomorrow, Inc - Norco 2107--Rockstars of Tomorrow, Inc - Norco	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005831 10136005831	1,750.00 1,750.00	465.00 1,085.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/12/2023	6/5/2023	B-267501499	2107--Rockstars of Tomorrow, Inc - Norco	5880--Instructional Vendors &	10136005831	1,750.00	200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/12/2023	6/3/2023	B-267501421	2372--Outschool 2372--Outschool	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005887 10136005887	1,749.00 1,749.00	798.00 951.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/12/2023	6/1/2023	B-267501162	3052--Art Specs, Inc.	5880--Instructional Vendors &	10136005891	1,549.30	1,549.30	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/12/2023	5/11/2023	600986687	6015--Granite Telecommunications 6015--Granite Telecommunications	5910--Telephone 5910--Telephone	10136005880 10136005880	1,492.23 1,492.23	506.64 261.00	6/30/2023 6/30/2023	900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/12/2023	6/1/2023	603705810	6015--Granite Telecommunications 6015--Granite Telecommunications	5910--Telephone 5910--Telephone	10136005880 10136005880	1,492.23 246.36	478.23 6/30/2023	6/30/2023	900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/12/2023	6/1/2023	B-267501562	1917--The Center Stage Studio	5880--Instructional Vendors &	10136005896	1,455.00	1,455.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/12/2023	5/28/2023	9936002058	5421--Verizon Wireless 5421--Verizon Wireless	5910--Telephone 5910--Telephone	10136005877 10136005877	1,396.55 1,396.55	474.63 921.72	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/12/2023	5/18/2023	B-267501567	6014--TOCA Soccer	5880--Instructional Vendors &	10136005914	1,139.00	1,139.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/12/2023	6/1/2023	B-267500789	5519--Pony Hayvin Ranch	5880--Instructional Vendors &	10136005819	1,100.00	1,100.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/12/2023	6/3/2023	00002E01V5223	1649--LPS 1649--LPS	5930--Postage 5930--Postage	10136005859 10136005859	88.89 88.89	15.94 30.93	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/12/2023	5/27/2023	00002E01V5213	1649--LPS 1649--LPS	5930--Postage 5930--Postage	10136005859 10136005859	88.89 88.89	27.73 14.29	6/30/2023 6/30/2023	900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/13/2023	5/26/2023	B-267501556	1540--StageLight Performing Arts	5880--Instructional Vendors &	20136003227	120.00	120.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	5/28/2023	B-267501392	5654--Denise Williams 5654--Denise Williams	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003275 20136003275	120.00 120.00	60.00 60.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/13/2023	5/19/2023	B-267500736	6019--Laura Fischer	5880--Instructional Vendors &	20136003293	100.00	100.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	5/27/2023	B-267500726	v3146--Mandie Schenkenberger	5880--Instructional Vendors &	20136003245	67.50	67.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	5/25/2023	B-267501381	2391--Christian Classical Conservatory LLC	5880--Instructional Vendors &	20136003305	50.00	50.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	5/24/2023	B-267500763	5943--MYTEK Lab, Inc.	5880--Instructional Vendors &	20136003244	49.00	49.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	6/3/2023	B-267501157	1622--Art Experience Studio	5880--Instructional Vendors &	20136003270	42.50	42.50	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	6/6/2023	B-267501493	1954--Joyful Music and Arts	5880--Instructional Vendors &	20136003248	40.00	40.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	5/24/2023	B-267501406	1419--Kick It Up	5880--Instructional Vendors &	20136003235	32.50	32.50	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	5/28/2023	B-267500786	2132--Piano Studio of Natalie Warren	5880--Instructional Vendors &	20136003257	207.00	207.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	6/5/2023	B-267501491	5840--Homegrown Garden Skills	5880--Instructional Vendors &	20136003276	200.00	200.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	6/1/2023	B-267500775	3101--OC All-Stars Cheer & Dance, Inc.	5880--Instructional Vendors &	20136003251	195.00	195.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	5/15/2023	B-267501505	2880--Signing the Gap 2880--Signing the Gap	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003263 20136003263	181.00 181.00	59.00 122.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/13/2023	6/2/2023	B-267501410	5847--Mastery Tutoring with Monique	5880--Instructional Vendors &	20136003281	180.00	180.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	6/1/2023	B-267501358	5829--Broadway Gymnastics School	5880--Instructional Vendors &	20136003261	168.00	168.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	5/30/2023	B-267500796	1064--Redlands Gymnastics Club 1064--Redlands Gymnastics Club	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003254 20136003254	163.00 163.00	84.00 79.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/13/2023	5/30/2023	B-267501508	1412--South Coast Conservatory	5880--Instructional Vendors &	20136003246	160.00	160.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	6/2/2023	B-267501426	1863--Jing Ma	5880--Instructional Vendors &	20136003300	138.00	138.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	5/25/2023	B-267500766	2877--Nataly Jewel	5880--Instructional Vendors &	20136003288	130.75	130.75	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	6/5/2023	B-267501555	4111--Spanish Time 123	5880--Instructional Vendors &	20136003240	380.00	380.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	5/22/2023	B-267500798	2298--Riverside Aquatics Association	5880--Instructional Vendors &	20136003234	367.50	367.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	6/5/2023	B-267501488	4174--FortePiano Music School	5880--Instructional Vendors &	20136003236	359.00	359.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	5/23/2023	B-267500787	1937--Play Your Part, Inc.	5880--Instructional Vendors &	20136003287	345.00	345.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	5/23/2023	B-267500762	3305--Music Maker Inc.	5880--Instructional Vendors &	20136003304	325.00	325.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	6/1/2023	B-267501572	2798--Traditional Equestrian School	5880--Instructional Vendors &	20136003252	320.00	320.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/13/2023	6/2/2023	B-267501349	1441--AVPA at La Sierra University	5880--Instructional Vendors &	20136003278	312.20	312.20	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	6/3/2023	B-267501252	1382--Art Studio Pilar	5880--Instructional Vendors &	20136003253	300.00	300.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/13/2023	5/26/2023	B-267501575	5875--Valley Wide Elite Gymnastics	5880--Instructional Vendors &	20136003277	300.00	300.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

6/13/2023	5/31/2023 5/31/2023	B-267501442 B-267500794	2147--Rebecca Meta Scott 2147--Rebecca Meta Scott 2147--Rebecca Meta Scott	5880--Instructional Vendors & 5880--Instructional Vendors & 5880--Instructional Vendors &	20136003243 20136003243 20136003243	299.20 299.20 299.20	51.00 51.00 197.20	6/30/2023 6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	5/11/2023	B-267500732	4146--Mary C. Roberts	5880--Instructional Vendors &	20136003241	270.00	270.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/13/2023	5/30/2023	B-267501585	2202--Watersafe Swim School Inc.	5880--Instructional Vendors &	20136003291	270.00	270.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/2/2023	B-267501401	3004--German School Campus, Inc.	5880--Instructional Vendors &	20136003302	262.50	262.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/1/2023 5/24/2023	B-267501409 B-267500730	4109--Maria's Learning Shop 4109--Maria's Learning Shop	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003279 20136003279	250.00 250.00	80.00 200.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
6/13/2023	6/5/2023	B-267501496	4182--NEWSONG Studio	5880--Instructional Vendors &	20136003249	250.00	250.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/1/2023	B-267501579	5581--Victory Aquatics 5581--Victory Aquatics	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003280 20136003280	240.00 240.00	60.00 180.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	5/21/2023	B-267500785	1415--Hong Liang	5880--Instructional Vendors &	20136003269	240.00	240.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/6/2023	B-267501602	5492--Mathnasium of Ladera Ranch	5880--Instructional Vendors &	20136003308	225.00	225.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/2/2023	300640223	5522--KM Educational Consulting & Executive C 5522--KM Educational Consulting & Executive C	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	20136003274 20136003274	225.00 225.00	148.50 76.50	6/30/2023 6/30/2023	900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/13/2023	6/5/2023	B-267501492	5686--Huntington Learning Center	5880--Instructional Vendors &	20136003298	504.48	504.48	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/13/2023	6/1/2023	B-267501427	1936--Laurie Ellen Mehloth	5880--Instructional Vendors &	20136003306	500.00	500.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023	B-267501453	5841--San Diego Surfing School Inc.	5880--Instructional Vendors &	20136003256	495.00	495.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/1/2023	B-267501573	5877--Ultra Jiu Jitsu Academy 5877--Ultra Jiu Jitsu Academy	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003239 20136003239	480.00 480.00	160.00 320.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	6/5/2023	B-267501502	1926--Royce Grace Jiu Jitsu Academy	5880--Instructional Vendors &	20136003242	462.50	462.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/30/2023 5/15/2023	KE-2700284C05302307 960	2276--Kwico, Inc. 2276--Kwico, Inc.	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	20136003267 20136003267	458.44 458.44	134.63 323.81	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/13/2023	3/14/2023 3/14/2023	4004903 4005831	1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	20136003301 20136003301	451.21 451.21	353.51 97.70	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	6/1/2023	B-267501415	3401--Christina Choate	5880--Instructional Vendors &	20136003307	440.00	440.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/30/2023 6/5/2023	B-267500803 B-267501498	3310--Rockside Music Inc 3310--Rockside Music Inc	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003258 20136003258	428.42 428.42	360.00 68.42	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/13/2023	6/4/2023	B-267501397	4165--Denise A. Klein	5880--Instructional Vendors &	20136003286	420.00	420.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/1/2023	B-267501394	v3012--Do Re Michelle Music School	5880--Instructional Vendors &	20136003260	400.00	400.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/1/2023	B-267501402	2177--Greenwave Surf	5880--Instructional Vendors &	20136003292	400.00	400.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/5/2023	B-267501501	2315--Roos Music	5880--Instructional Vendors &	20136003284	875.00	875.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/24/2023	B-267501557	5834--Stephanie Abney	5880--Instructional Vendors &	20136003237	875.00	875.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/30/2023	B-267501507	3025--IncludeEducation	5880--Instructional Vendors &	20136003295	855.75	855.75	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/1/2023	B-267501554	2583--Spanish Advantage 2583--Spanish Advantage	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003271 20136003271	823.00 823.00	656.00 167.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/13/2023	5/30/2023	B-267500780	v3093--One Jiu Jitsu and Fitness	5880--Instructional Vendors &	20136003228	805.00	805.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023	B-267501574	2101--Automotive Technology Group, Inc. dba	5880--Instructional Vendors &	20136003259	800.00	800.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023	B-267501600	4127--Meena Yoon	5880--Instructional Vendors &	20136003232	738.10	738.10	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/30/2023	B-267501584	2127--Waterfront Education	5880--Instructional Vendors &	20136003231	660.00	660.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/13/2023	5/22/2023 6/5/2023	B-267501452 B-267501503	6038--San Clemente Dance & Performing Arts C 6038--San Clemente Dance & Performing Arts C	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003250 20136003250	655.50 655.50	240.00 415.50	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/13/2023	5/24/2023	B-267500795	2610--Rebecca Lynn Starbeck 2610--Rebecca Lynn Starbeck	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003297 20136003297	640.75 640.75	390.25 250.50	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/13/2023	5/26/2023	B-267500779	v3076--Cristina E. O'Connell	5880--Instructional Vendors &	20136003289	625.00	625.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023	B-267500478	2802--Carrie a Tune	5880--Instructional Vendors &	20136003282	600.00	600.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	6/2/2023	B-267501117	4115--1 Art-Megapokels School of Art 4115--1 Art-Megapokels School of Art	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003229 20136003229	1,064.25 1,064.25	774.00 290.25	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/13/2023	5/29/2023	B-267500750	2244--Miss Crady the Math Lady 2244--Miss Crady the Math Lady	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003264 20136003264	1,027.96 1,027.96	584.78 443.18	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/13/2023	5/30/2023 5/30/2023	B-267500752 B-267501414	6024--Monica L. Silvey 6024--Monica L. Silvey	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003268 20136003268	983.84 983.84	720.00 263.84	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023	B-267500476	1126--Buzzy Mae Music Academy	5880--Instructional Vendors &	20136003290	943.75	943.75	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/29/2023	B-267500767	3005--New California Conservatory of Music	5880--Instructional Vendors &	20136003247	936.00	936.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023	B-267500483	5520--Creative Academy Tutoring Center	5880--Instructional Vendors &	20136003238	900.00	900.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023 6/1/2023	B-267500473 B-267501357	3329--Blue Buty Swim School 3329--Blue Buty Swim School	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003255 20136003255	800.00 800.00	710.00 90.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/13/2023	5/30/2023	B-267500776	5545--Okiana Kalknka dba OC Dancing	5880--Instructional Vendors &	20136003265	780.00	780.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/13/2023	5/29/2023 5/29/2023	B-267500791 B-267501440	2078--Private Ballet Coaching with Lauren Herr 2078--Private Ballet Coaching with Lauren Herr	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003294 20136003294	778.88 778.88	678.88 100.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/13/2023	6/6/2023 5/27/2023	B-267500238 B-267500801	2381--Robin Nesom Young 2381--Robin Nesom Young	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003296 20136003296	770.00 770.00	630.00 140.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/13/2023	6/3/2023	B-267501390	1984--The Colburn School 1984--The Colburn School	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003285 20136003285	769.38 769.38	560.45 208.93	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023 5/31/2023	1290 1289	4180--LanguageBrd, Inc. 4180--LanguageBrd, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003283 20136003283	2,740.00 2,740.00	1,370.00 1,370.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

6/13/2023	5/30/2023 5/29/2023	B-267501441 B-267500793	5846--Raise the Barre 5846--Raise the Barre 5846--Raise the Barre	5880--Instructional Vendors & 5880--Instructional Vendors & 5880--Instructional Vendors &	20136003262 20136003262 20136003262	2,664.84 2,664.84 2,664.84	507.50 724.00 1,433.34	6/30/2023 6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	6/1/2023	B-267501416	4162--Baiko Israel 4162--Baiko Israel	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003299 20136003299	2,399.45 2,399.45	2,101.45 288.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023	B-267500465	2022--A+ in Home Tutors, Inc. 2022--A+ in Home Tutors, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003266 20136003266	2,335.00 2,335.00	1,985.00 350.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/13/2023	6/3/2023	B-267501398	1789--Fashion Camp - Create, Design, Sew. LLI 1789--Fashion Camp - Create, Design, Sew. LLI	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003303 20136003303	2,326.00 2,326.00	993.00 1,333.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	6/3/2023	B-267501399	4184--Free Society Academics 4184--Free Society Academics	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003272 20136003272	2,038.00 2,038.00	900.00 1,138.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	5/31/2023	B-267501566	1409--To the Pointe Dance Productions	5880--Instructional Vendors &	20136003273	2,009.00	2,009.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/13/2023	6/4/2023	B-267501348	v3054--Ascend Institute for Youth Skills Develop	5880--Instructional Vendors &	20136003233	1,739.63	1,739.63	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/13/2023	2/27/2023 3/11/2023 5/29/2023	18DF-XTMD-1614 14YK-JT6M-FQDM 1V0T-GR9D-TGHP	1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc.	4310--Materials & Supplies 4310--Materials & Supplies 4320--Office Supplies	20136003226 20136003226 20136003226	1,188.84 1,188.84 1,188.84	34.95 148.79 13.83	6/30/2023 6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds 906--Education Services	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	5/29/2023 3/12/2023 3/10/2023 3/11/2023 3/12/2023 3/10/2023 4/13/2023 3/10/2023 3/15/2023	133D-GW64-1LGM 19W3-DGPC-GW9F 141K-JT6M-7KCT 146N-YANX-DT4C 19W3-DGPC-JJH7 164E-R39P-LV7Y 1V7J-KX6Z-6XF3 164J-ZXR-7QJ1 166R-Q19W-7WXY	1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc.	4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies	20136003226 20136003226 20136003226 20136003226 20136003226 20136003226 20136003226 20136003226 20136003226	1,188.84 1,188.84 1,188.84 1,188.84 1,188.84 1,188.84 1,188.84 1,188.84 1,188.84	60.24 81.55 98.22 12.22 50.53 66.20 91.33 18.64	6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/13/2023	2/28/2023 3/9/2023 6/5/2023 3/6/2023	1376-VCLV-WPCP 128H-HM6E-3PHC 171C-R63N-36J4 14DL-JMRW-H6FC 1T6Z-L914-1FSR	1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc.	4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4100--Textbooks & Core Curricu	20136003226 20136003226 20136003226 20136003226	1,188.84 1,188.84 1,188.84 1,188.84	367.07 16.46 19.38 10.76	6/30/2023 6/30/2023 6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/13/2023	6/2/2023	B-267501391	2964--Corona Inline	5880--Instructional Vendors &	20136003230	1,093.65	1,093.65	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/19/2023	6/19/2023	5795-061823	5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA	9516--Voluntary FSA 9516--Voluntary FSA 9516--Voluntary FSA 9516--Voluntary FSA	1,285.19 1,285.19 1,285.19 1,285.19	80.88 76.74 395.30 41.67	6/30/2023 6/30/2023 6/30/2023 6/30/2023	Lisa Murphy Lorrie Wood Lorrie Wood Lisa Murphy	000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
6/20/2023	6/9/2023	6847	5747--History Simulation	4100--Textbooks & Core Curricu	10136005961	100.00	100.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/14/2023	B-267503197	5524--The Little Gym of Riverside	5880--Instructional Vendors &	10136005973	90.00	90.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/20/2023	6/12/2023	B-267503179	5548--Sektor Ju-Jitsu 5548--Sektor Ju-Jitsu	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005921 10136005921	76.25 76.25	40.00 36.25	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
6/20/2023	6/12/2023	B-267503237	4147--Kelsey Mira Slater	5880--Instructional Vendors &	10136005937	70.00	70.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267502782	3052--Art Steps, Inc.	5880--Instructional Vendors &	10136005964	68.50	68.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267502784	v3089--B & B Music School	5880--Instructional Vendors &	10136005942	60.00	60.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267502813	5481--Freedom in Motion Gym, LLC	5880--Instructional Vendors &	10136006002	54.00	54.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267503108	5532--Muestra Escuela Spanish Academy	5880--Instructional Vendors &	10136006000	50.00	50.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/20/2023	6/12/2023	B-267503137	v3032--Peace Hill Classical Co-op LLC	5880--Instructional Vendors &	10136005983	50.00	50.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/20/2023	6/12/2023	B-267503195	5998--Temecula Music Teacher LLC	5880--Instructional Vendors &	10136006004	38.00	38.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267503185	5487--Southland Ballet Academy	5880--Instructional Vendors &	10136005935	37.50	37.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/13/2023	B-267503256	5577--Mission Viejo Family YMCA	5880--Instructional Vendors &	10136005991	26.00	26.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267503184	1874--South County Dance Inc.	5880--Instructional Vendors &	10136005928	20.00	20.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/8/2023	0243547-IN	6050--Frog Street Press LLC 6050--Frog Street Press LLC	9330--Prepaid Expenses 9330--Prepaid Expenses	10136005969 10136005969	200.00 200.00	68.00 132.00	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/20/2023	6/13/2023	267469113	5817--Logos Calligraphy & Design	4100--Textbooks & Core Curricu	10136005933	169.21	169.21	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/20/2023	6/12/2023	B-267502781	1849--Art Steps, Inc Yorba Linda	5880--Instructional Vendors &	10136005984	161.00	161.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/6/2023	B-267502140	2211--Valerie March Music	5880--Instructional Vendors &	10136005931	160.00	160.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/20/2023	6/12/2023	B-267502769	5960--Alisha Curtin	5880--Instructional Vendors &	10136005951	153.00	153.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/7/2023	1611	v3048--Mr. D Math, LLC	4100--Textbooks & Core Curricu	10136005923	145.00	145.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267502809	5976--Epic Surf Skills	5880--Instructional Vendors &	10136005987	140.00	140.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/14/2023	B-267503134	3109--New Modern Music School US Inc.	5880--Instructional Vendors &	10136005971	134.00	134.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/20/2023	6/7/2023	B-267502126	4110--Gabrina Castillas Owen	5880--Instructional Vendors &	10136005986	130.00	130.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/13/2023	B-267503097	6040--City of Champions	5880--Instructional Vendors &	10136005974	128.00	128.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267503183	3365--South Coast Repertory, Inc.	5880--Instructional Vendors &	10136005993	125.00	125.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267503255	2255--Yamaha Music School Cerritos/Chino Hill	5880--Instructional Vendors &	10136005963	120.00	120.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267503173	6030--Providence Heart Ranch	5880--Instructional Vendors &	10136005989	120.00	120.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023	B-267502794	v3140--Cadenza Music Academy	5880--Instructional Vendors &	10136005930	100.00	100.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/20/2023	6/9/2023	B-267503104	5557--Music Lessons with Jena	5880--Instructional Vendors &	10136005957	100.00	100.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/8/2023	B-267502133	1166--Math Learning Rendondo Beach	5880--Instructional Vendors &	10136005968	64.00	64.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/20/2023	6/12/2023	B-267503176	6051--Riffs Music	5880--Instructional Vendors &	10136005922	455.00	455.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/6/2023	B-267502134	5485--Mike McKinnon	5880--Instructional Vendors &	10136005941	442.50	442.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	6/14/2023	B-267503102	5593--Mathnasium of Corona	5880--Instructional Vendors &	10136005948	413.50	413.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

6/20/2023	6/8/2023	B-267502123	1949--Kids Art Pasadena	5880--Instructional Vendors &	10136005998	388.00	388.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/20/2023	6/13/2023	4781	1966--Super Teacher Worksheets 1966--Super Teacher Worksheets	9130--Prepaid Expenses 9130--Prepaid Expenses	10136005996 10136005996	375.00 375.00	247.50 127.50	In Transit In Transit	900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/20/2023	6/8/2023	8978-0773-6891	1210--Starfall Educational Foundation 1210--Starfall Educational Foundation	9130--Prepaid Expenses 9130--Prepaid Expenses	10136005975 10136005975	355.00 355.00	130.70 234.30	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	5/30/2023	B-267500521	4185--Kumon Math and Reading - Tustin Ranch	5880--Instructional Vendors &	10136006003	345.00	345.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/10/2023	B-267502798	2623--Dexter Creative	5880--Instructional Vendors &	10136005982	342.00	342.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/12/2023	B-267502785	4103--Elizabeth K Gibbs	5880--Instructional Vendors &	10136005981	325.00	325.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/12/2023	B-267503121	5571--PAVE School of the Arts	5880--Instructional Vendors &	10136005980	324.00	324.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	5/31/2023	B-267501596	2041--Yamaha Music Academy of Fountain Vall	5880--Instructional Vendors &	10136005939	304.00	304.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/13/2023	B-267503099	5714--Irene School of Rhythmic Gymnastics	5880--Instructional Vendors &	10136005992	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/11/2023	B-267502789	5889--Brian Patrick	5880--Instructional Vendors &	10136005999	300.00	300.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/12/2023	B-267503193	5688--Sundance Hills Equestrian Center LLC	5880--Instructional Vendors &	10136005925	280.00	280.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/12/2023	B-267503174	6020--R.I.C.A. Dance	5880--Instructional Vendors &	10136005947	275.00	275.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/12/2023	B-267502777	5864--AquaFit Explorations and Safety Training 5864--AquaFit Explorations and Safety Training	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005932 10136005932	240.00 240.00	84.00 156.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/20/2023	6/12/2023	B-267502799	6032--Ebelin Valderrama	5880--Instructional Vendors &	10136005997	238.00	238.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/14/2023	B-267503133	5816--Monrovia Music Academy	5880--Instructional Vendors &	10136005967	236.60	236.60	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/20/2023	6/12/2023	B-267503110	5832--OC Next Act	5880--Instructional Vendors &	10136005955	226.64	226.64	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/11/2023	B-267501601	2309--Zak Barnett Studios	5880--Instructional Vendors &	10136005954	215.53	215.53	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/20/2023	6/12/2023	261527	3211--Read Naturally Inc 3211--Read Naturally Inc	9130--Prepaid Expenses 9130--Prepaid Expenses	10136005929 10136005929	1,150.00 1,150.00	759.00 391.00	In Transit In Transit	900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/20/2023	6/13/2023	B-267503096	1907--Armory Center for the Arts	5880--Instructional Vendors &	10136005959	1,117.50	1,117.50	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/20/2023	6/12/2023	B-267503253	v3174--MultiRiver Studios LLC	5880--Instructional Vendors &	10136005970	841.00	841.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	5/14/2023 5/31/2023	52157447 RI 52186180 RI	2345--Carolina Biological Supply Company 2345--Carolina Biological Supply Company	4310--Materials & Supplies 4310--Materials & Supplies	10136005958 10136005958	775.56 775.56	400.71 374.85	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale	
6/20/2023	6/12/2023	B-267503223	4197--Victoria Knell	5880--Instructional Vendors &	10136005943	726.50	726.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/12/2023	B-267503211	5926--Tutu School Carlsbad	5880--Instructional Vendors &	10136005944	672.00	672.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/9/2023	B-267502768	V3170--A+ Tutoring Inc.	5880--Instructional Vendors &	10136005950	630.00	630.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/20/2023	6/12/2023	B-267502795	2749--Circle City School Enrichment Program	5880--Instructional Vendors &	10136005945	619.95	619.95	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/7/2023	B-267502131	v3067--K2 Studios, LLC v3067--K2 Studios, LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005965 10136005965	585.00 585.00	185.00 400.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/20/2023	6/13/2023	B-267503180	5726--Silva Ju-Jitsu Academy	5880--Instructional Vendors &	10136005926	500.00	500.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/13/2023	B-267503171	5514--Pleasant Street Stable	5880--Instructional Vendors &	10136005956	500.00	500.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/20/2023	6/15/2023	1418	5809--Charter Connect 5809--Charter Connect	5841--Community Marketing 5841--Community Marketing	10136005953 10136005953	500.00 500.00	170.00 330.00	6/30/2023 6/30/2023	900--Operations 900--Operations	2053--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/13/2023	B-267503213	5717--Urban Youth Park	5880--Instructional Vendors &	10136005960	489.00	489.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
6/20/2023	6/6/2023	B-267502114	6037--Aesthetic Climbing Gym, LLC	5880--Instructional Vendors &	10136005936	467.50	467.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/13/2023	B-267503098	4156--Gracie Barra San Clemente	5880--Instructional Vendors &	10136005949	465.00	465.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	5/30/2023	B-267501560	1071--Terra Arts Foundation 1071--Terra Arts Foundation	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005995 10136005995	6,290.41 6,290.41	1,217.53 5,072.88	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/6/2023	5464920	5784--iXL Learning 5784--iXL Learning	9130--Prepaid Expenses 9130--Prepaid Expenses	10136005972 10136005972	3,525.00 3,525.00	1,198.50 2,326.50	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/12/2023	B-267502766	2717--Tree of Knowledge 2717--Tree of Knowledge	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005985 10136005985	3,150.00 3,150.00	2,200.00 950.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/2/2023	B-267501590	6009--Winners Circle Athletics	5880--Instructional Vendors &	10136005927	2,584.34	2,584.34	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	4/24/2023	3664326	5108--CliftonLarsonAllen LLP 5108--CliftonLarsonAllen LLP	5820--Audit & CPA 5820--Audit & CPA	10136005938 10136005938	2,100.00 2,100.00	1,386.00 714.00	6/30/2023 6/30/2023	900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/20/2023	5/3/2023	HW-C275803	5201--Graduation Source 5201--Graduation Source	4390--Other Supplies 4390--Other Supplies	10136006001 10136006001	2,068.72 2,068.72	703.36 1,365.36	6/30/2023 6/30/2023	906--Education Services 906--Education Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/2/2023	1903190481	5664--Infinity Kids Corporation 5664--Infinity Kids Corporation	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	10136005976 10136005976	1,885.00 1,885.00	520.00 1,365.00	6/30/2023 6/30/2023	PT Services Speech Services	907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/20/2023	6/13/2023	B-267503120	2372--Outschool 2372--Outschool	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005978 10136005978	1,805.50 1,805.50	962.00 843.50	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/8/2023	GG178927	v3171--Generation Genius, Inc. v3171--Generation Genius, Inc.	9130--Prepaid Expenses 9130--Prepaid Expenses	10136005934 10136005934	1,795.00 1,795.00	1,184.70 610.30	In Transit In Transit	900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
6/20/2023	6/7/2023	B-267502742	5912--Waterworks Swim School Corona	5880--Instructional Vendors &	10136005924	1,756.90	1,756.90	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
6/20/2023	6/11/2023	201001	5950--CASBO 5950--CASBO	9130--Prepaid Expenses 9130--Prepaid Expenses	10136005988 10136005988	1,750.00 1,750.00	595.00 1,155.00	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/12/2023	441710	3233--MobyMax 3233--MobyMax	9130--Prepaid Expenses 9130--Prepaid Expenses	10136005946 10136005946	1,659.00 1,659.00	564.06 1,094.94	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/8/2023	21W00019229	5395--TeachersPayTeachers 5395--TeachersPayTeachers	9130--Prepaid Expenses 9130--Prepaid Expenses	10136005962 10136005962	1,650.00 1,650.00	561.00 1,089.00	In Transit In Transit	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
6/20/2023	6/14/2023	B-267503132	5496--Gracie Barra Upland	5880--Instructional Vendors &	10136005990	1,590.00	1,590.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

6/20/2023	6/12/2023 5/31/2023	B-267503254 B-267501594	2092--World Elite Gymnastics 2092--World Elite Gymnastics	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005994 10136005994	1,488.90 1,488.90	178.50 1,310.40	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/20/2023	6/12/2023 5/31/2023	B-267503252 B-267501586	2341--West Coast Krav Mega Temecula 2341--West Coast Krav Mega Temecula	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005940 10136005940	1,364.32 1,364.32	359.10 1,005.22	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/20/2023	5/31/2023	B-267501593	4121--Wm Tutoring Services 4121--Wm Tutoring Services	5880--Instructional Vendors & 5880--Instructional Vendors &	10136005979 10136005979	1,320.00 1,320.00	900.00 420.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/20/2023	5/24/2023	B-267500510	5997--Kids Gardening Center	5880--Instructional Vendors &	10136005966	311.77	311.77	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/20/2023	5/31/2023	14824231	5296--LEAF 5296--LEAF	5620--Equipment Leases 5620--Equipment Leases	10136005977 10136005977	143.86 143.86	48.91 94.95	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/20/2023	6/10/2023	00002E01V5233	1649--LPS 1649--LPS	5930--Postage 5930--Postage	10136005952 10136005952	20.39 20.39	6.93 13.46	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/21/2023	6/13/2023	B-267502812	1789--Fashion Camp - Create Design Sew. Lu	5880--Instructional Vendors &	20136003332	99.00	99.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/7/2023	B-267502130	1304--Intro 2 Skateboarding LLC	5880--Instructional Vendors &	20136003334	83.00	83.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/21/2023	6/12/2023	B-267503170	2102--Play-Well TEKologies	5880--Instructional Vendors &	20136003324	75.00	75.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267503214	5875--Valley Wide Elite Gymnastics	5880--Instructional Vendors &	20136003366	75.00	75.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/7/2023	B-267502137	1937--Play Your Part, Inc.	5880--Instructional Vendors &	20136003348	73.75	73.75	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/10/2023	B-267502767	2022--A+ In Home Tutors, Inc.	5880--Instructional Vendors &	20136003343	70.00	70.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267502776	2577--Amanda Leigh Holiday	5880--Instructional Vendors &	20136003312	68.75	68.75	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267503178	6038--San Clemente Dance & Performing Arts (5880--Instructional Vendors &	20136003314	64.50	64.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/9/2023	B-267502800	3250--Edward V. West	5880--Instructional Vendors &	20136003321	63.75	63.75	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267503107	4182--NEWSONG Studio	5880--Instructional Vendors &	20136003359	50.00	50.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/13/2023	B-267503177	2315--Roos Music	5880--Instructional Vendors &	20136003362	43.75	43.75	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267502811	4165--Denise A Klein	5880--Instructional Vendors &	20136003351	35.00	35.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267503175	1064--Redlands Gymnastics Club	5880--Instructional Vendors &	20136003315	23.67	23.67	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Helendale
6/21/2023	6/12/2023	B-267503111	v3076--Cristina E. O'Connell	5880--Instructional Vendors &	20136003358	214.50	214.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/13/2023	B-267503209	1259--Rok Music Academy of Long Beach	5880--Instructional Vendors &	20136003311	212.50	212.50	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/21/2023	6/12/2023	B-267502816	1399--Gyphon Fitness Studio 1399--Gyphon Fitness Studio	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003316 20136003316	210.00 210.00	70.00 140.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267502793	1126--Buzzy Mae Music Academy	5880--Instructional Vendors &	20136003340	200.00	200.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/10/2023	B-267502801	5813--Encourage Learning	5880--Instructional Vendors &	20136003350	160.00	160.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/14/2023	B-267503100	5958--Let's Play Music with Laura Varga	5880--Instructional Vendors &	20136003310	156.25	156.25	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267503181	5871--South Coast Performing Arts, LLC	5880--Instructional Vendors &	20136003357	154.64	154.64	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/13/2023	B-267502815	2177--Greenwave Surf	5880--Instructional Vendors &	20136003339	150.00	150.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267503186	2583--Spanish Advantage 2583--Spanish Advantage	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003330 20136003330	140.00 140.00	70.00 70.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
6/21/2023	6/13/2023	1W0309411	3337--Edmentum 3337--Edmentum	9330--Prepaid Expenses 9330--Prepaid Expenses	20136003342 20136003342	130.00 130.00	44.20 85.80	6/30/2023 6/30/2023	900--Operations 900--Operations	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/21/2023	6/7/2023	B-267502122	2335--Calque Ju-Jitsu	5880--Instructional Vendors &	20136003347	130.00	130.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/21/2023	6/12/2023	B-267503106	2106--Neighborhood Music School Inc	5880--Instructional Vendors &	20136003370	120.00	120.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/21/2023	6/13/2023	B-267502808	3330--American Tiger Martial Arts & Fitness	5880--Instructional Vendors &	20136003337	109.50	109.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/7/2023	B-267502144	4127--Meena Yoon	5880--Instructional Vendors &	20136003323	108.50	108.50	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	5/30/2023	B-267501588	3336--Debra K. Hardman	5880--Instructional Vendors &	20136003365	100.00	100.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/13/2023	B-267503187	3012--Stars Gymnastics LLC	5880--Instructional Vendors &	20136003333	376.20	376.20	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/21/2023	6/7/2023	B-267502132	1026--MM Surfing School	5880--Instructional Vendors &	20136003320	375.00	375.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267503119	5995--Online AYCVLOGIC Coding Academy for Ki	5880--Instructional Vendors &	20136003360	289.00	289.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Warner
6/21/2023	6/7/2023	B-267502121	3126--Archery Champs	5880--Instructional Vendors &	20136003335	280.00	280.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267502820	1873--Krav Maga of Orange County	5880--Instructional Vendors &	20136003349	276.00	276.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267503101	3318--M3 Creative Academy	5880--Instructional Vendors &	20136003331	270.00	270.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/21/2023	10/13/2022	1207	5620--Life & Tech USA, Inc. 5620--Life & Tech USA, Inc.	4390--Other Supplies 4390--Other Supplies	20136003344 20136003344	245.00 245.00	161.70 83.30	6/30/2023 6/30/2023	906--Education Services 906--Education Services	2073--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Warner
6/21/2023	6/9/2023	JN2023060906	3042--MEL Science US	4100--Textbooks & Core Curricu	20136003327	225.62	225.62	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/21/2023	6/12/2023	B-267502810	5845--Eriko Tsuji	5880--Instructional Vendors &	20136003361	220.00	220.00	6/30/2023	910--Instructional Funds	2053--Excel Academy Charter School - Warner
6/21/2023	6/12/2023	B-267502775	3082--AlSijdah Academy	5880--Instructional Vendors &	20136003363	1,276.00	1,276.00	6/30/2023	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
6/21/2023	6/14/2023 6/6/2023	B-267503131 B-267502127	1883--Georganne Goult 1883--Georganne Goult	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003322 20136003322	1,157.62 1,157.62	71.03 1,086.59	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
6/21/2023	6/6/2023	B-267502128	2007--Hingar 18 East Riverside, Inc. 2007--Hingar 18 East Riverside, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	20136003329 20136003329	1,102.00 1,102.00	88.00 1,014.00	6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
6/21/2023	5/9/2023 6/10/2023 6/12/2023 6/13/2023	1YCF-1LFT-CVDP 1Y1N-MYCV-FLGY 14FT-NRWS-11OP 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc.	1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc.	4310--Materials & Supplies 4310--Materials & Supplies 4320--Office Supplies 4320--Office Supplies	20136003309 20136003309 20136003309 20136003309	908.18 908.18 908.18 908.18	450.26 15.74 32.00 16.48	6/30/2023 6/30/2023 6/30/2023 6/30/2023	910--Instructional Funds 910--Instructional Funds 900--Operations 900--Operations	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

6/1/2023	1ML3-3GDF-1FFW	1925-Amazon Capital Services, Inc. 1925-Amazon Capital Services, Inc. 1925-Amazon Capital Services, Inc. 1925-Amazon Capital Services, Inc. 1925-Amazon Capital Services, Inc.	4320-Office Supplies 4320-Office Supplies 4320-Office Supplies 4320-Office Supplies 4320-Office Supplies	20136003309 20136003309 20136003309 20136003309 20136003309	908.18 908.18 908.18 908.18 908.18	14.20 27.55 54.95 106.66 78.38	6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023	906-Education Services 906-Education Services 900-Operations 900-Operations 900-Operations	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner		
6/9/2023	11DM-L476-634D	1925-Amazon Capital Services, Inc. 1925-Amazon Capital Services, Inc.	4320-Office Supplies 4320-Office Supplies	20136003309 20136003309	908.18 908.18	40.38	6/30/2023	900-Operations	2073-Excel Academy Charter School - Helendale		
6/21/2023	6/13/2023 5/15/2023	B-267502819 B-267498671	1988-Joe Ferrante Music Academy 1988-Joe Ferrante Music Academy	5880-Instructional Vendors & 5880-Instructional Vendors &	20136003353 20136003353	867.82 867.82	267.82 600.00	6/30/2023 6/30/2023	910-Instructional Funds 910-Instructional Funds	2073-Excel Academy Charter School - Helendale 2073-Excel Academy Charter School - Helendale	
6/21/2023	6/15/2023	B-267502358	5579-Evolution Swim Academy Rancho Mission	5880-Instructional Vendors &	20136003318	846.00	846.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/21/2023	6/17/2023	B-267502135	1104-Michael D. Wong	5880-Instructional Vendors &	20136003356	810.00	810.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/21/2023	6/9/2023	B-267502351	2127-Waterfront Education	5880-Instructional Vendors &	20136003313	758.00	758.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale	
6/21/2023	6/13/2023	B-267502814	5924-Goldfish Swim School of Aliso Viejo	5880-Instructional Vendors &	20136003368	705.00	705.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/21/2023	6/7/2023	B-267502136	1377-Olympia Training Center 1377-Olympia Training Center	5880-Instructional Vendors & 5880-Instructional Vendors &	20136003326 20136003326	675.00 675.00	325.00 350.00	6/30/2023 6/30/2023	910-Instructional Funds 910-Instructional Funds	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
6/21/2023	6/12/2023	B-267502817	3185-Olymstar International Corp.	5880-Instructional Vendors &	20136003338	600.00	600.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale	
6/21/2023	6/13/2023 4/9/2023	B-267503103 B-267494500	5492-Mathnasium of Ladera Ranch 5492-Mathnasium of Ladera Ranch	5880-Instructional Vendors & 5880-Instructional Vendors &	20136003328 20136003328	542.50 542.50	67.50 475.00	6/30/2023 6/30/2023	910-Instructional Funds 910-Instructional Funds	2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner	
6/21/2023	6/13/2023	B-267502797	2279-Cogito International, Inc	5880-Instructional Vendors &	20136003355	540.00	540.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/21/2023	6/7/2023	B-267502124	2269-Dunamik Dance Project, Inc	5880-Instructional Vendors &	20136003319	475.00	475.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/21/2023	6/7/2023	B-267502129	1971-Abby Zabby LLC DBA Home School Coact 1971-Abby Zabby LLC DBA Home School Coact	5880-Instructional Vendors & 5880-Instructional Vendors &	20136003369 20136003369	474.00 474.00	219.00 255.00	6/30/2023 6/30/2023	910-Instructional Funds 910-Instructional Funds	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
6/21/2023	6/12/2023	202217-56977	5470-Florida Virtual School 5470-Florida Virtual School 5470-Florida Virtual School 5470-Florida Virtual School	9130-Prepaid Expenses 9130-Prepaid Expenses 4101-Textbooks & Core Curricu 4101-Textbooks & Core Curricu	20136003341 20136003341 20136003341 20136003341	31,597.20 31,597.20 31,597.20 31,597.20	10,349.43 20,090.07 393.62 764.08	6/30/2023 6/30/2023 6/30/2023 6/30/2023	900-Operations 900-Operations 906-Education Services 906-Education Services	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
6/21/2023	2/28/2023 1/31/2023 1/31/2023 2/28/2023	1254 1242 1241 1255	4180-LanguageBrd, Inc. 4180-LanguageBrd, Inc. 4180-LanguageBrd, Inc. 4180-LanguageBrd, Inc.	5880-Instructional Vendors & 5880-Instructional Vendors & 5880-Instructional Vendors & 5880-Instructional Vendors &	20136003346 20136003346 20136003346 20136003346	7,350.00 7,350.00 7,350.00 7,350.00	2,220.00 2,485.00 1,370.00 1,275.00	6/30/2023 6/30/2023 6/30/2023 6/30/2023	910-Instructional Funds 910-Instructional Funds 910-Instructional Funds 910-Instructional Funds	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
6/21/2023	6/6/2023 5/31/2023	B-267502143 B-267501592	1033-WM Music Lessons 1033-WM Music Lessons 1033-WM Music Lessons 1033-WM Music Lessons	5880-Instructional Vendors & 5880-Instructional Vendors & 5880-Instructional Vendors & 5880-Instructional Vendors &	20136003325 20136003325 20136003325 20136003325	4,990.00 4,990.00 4,990.00 4,990.00	330.00 210.00 1,795.00 2,655.00	6/30/2023 6/30/2023 6/30/2023 6/30/2023	910-Instructional Funds 910-Instructional Funds 910-Instructional Funds 910-Instructional Funds	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
6/21/2023	6/15/2023	B-267502357	2956-Evolution Swim Academy Mission Viejo, L	5880-Instructional Vendors &	20136003317	3,276.00	3,276.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/21/2023	6/11/2023	B-267502821	5535-Little Surf Co.	5880-Instructional Vendors &	20136003345	2,086.23	2,086.23	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/21/2023	6/11/2023	B-267502324	2959-Victory Tae Kwon Do USA	5880-Instructional Vendors &	20136003336	2,040.00	2,040.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale	
6/21/2023	6/14/2023	B-267503188	2505-STEM Center USA	5880-Instructional Vendors &	20136003367	1,901.00	1,901.00	6/30/2023	910-Instructional Funds	2073-Excel Academy Charter School - Helendale	
6/21/2023	6/7/2023	B-267502125	5561-Firestorm Freerunning - Galaxy LLC 5561-Firestorm Freerunning - Galaxy LLC	5880-Instructional Vendors & 5880-Instructional Vendors &	20136003364 20136003364	1,675.00 1,675.00	400.00 1,275.00	6/30/2023 6/30/2023	910-Instructional Funds 910-Instructional Funds	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
6/21/2023	6/12/2023	B-267503139	5881-Peace Love & Dance, LLC	5880-Instructional Vendors &	20136003352	1,560.00	1,560.00	6/30/2023	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/21/2023	6/8/2023	5359-060823	5359-Ritney Bows 5359-Ritney Bows	5930-Postage 5930-Postage	20136003354 20136003354	402.50 402.50	136.85 265.65	6/30/2023 6/30/2023	900-Operations 900-Operations	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
6/23/2023	6/23/2023	5370-062623	5370-SchoolsFirst 5370-SchoolsFirst 5370-SchoolsFirst 5370-SchoolsFirst	9517-Voluntary 403b 9517-Voluntary 403b 9517-Voluntary 403b 9517-Voluntary 403b	20136003341 20136003341 20136003341 20136003341	16,835.13 16,835.13 16,835.13 16,835.13	4,414.83 2,541.19 8,570.00 1,309.11	6/30/2023 6/30/2023 6/30/2023 6/30/2023	403B/457B - 06.26.23 Payroll Regular 403B/457B - 06.26.23 Payroll Regular 403B/457B - 06.26.23 Payroll Regular 403B/457B - 06.26.23 Payroll Regular	000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale
6/23/2023	6/23/2023	5342-062323	5342-Michael Humphrey 5342-Michael Humphrey	5210-Mileage Reimbursements 5210-Mileage Reimbursements	20136003354 20136003354	17.03 17.03	11.24 5.79	6/30/2023 6/30/2023	Board Stipend - Annual Mileage Board Stipend - Annual Mileage	900-Operations 900-Operations	2053-Excel Academy Charter School - Helendale 2073-Excel Academy Charter School - Warner
6/23/2023	6/23/2023	5289-062323	5289-Larry Alvarado 5289-Larry Alvarado	5210-Mileage Reimbursements 5210-Mileage Reimbursements	20136003354 20136003354	34.06 34.06	22.48 11.58	6/30/2023 6/30/2023	Board Stipend - Annual Mileage Board Stipend - Annual Mileage	900-Operations 900-Operations	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Warner
6/23/2023	6/23/2023	5696-062323	5696-JP Morgan Chase Bank NA 5696-JP Morgan Chase Bank NA 5696-JP Morgan Chase Bank NA 5696-JP Morgan Chase Bank NA	9501-Accounts Payable - Purch 9501-Accounts Payable - Purch 9501-Accounts Payable - Purch 9501-Accounts Payable - Purch	20136003341 20136003341 20136003341 20136003341	11,656.03 11,656.03 11,656.03 11,656.03	6,844.46 238.00 462.00	6/30/2023 6/30/2023 6/30/2023 6/30/2023	Chase Purchase Card 05.01.23-05.31.23 Chase Purchase Card 05.01.23-05.31.23 Chase Purchase Card 05.01.23-05.31.23 Chase Purchase Card 05.01.23-05.31.23	000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner
6/25/2023	6/25/2023	5289-062523	5289-Larry Alvarado 5289-Larry Alvarado	5800-Professional Services - 5800-Professional Services -	20136003341 20136003341	300.00 300.00	300.00 300.00	6/30/2023 6/30/2023	Board Stipend - 06.01.23-06.30.23 Board Stipend - 06.01.23-06.30.23	900-Operations 900-Operations	2053-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner
6/25/2023	6/25/2023	5342-062523	5342-Michael Humphrey 5342-Michael Humphrey	5800-Professional Services - 5800-Professional Services -	20136003341 20136003341	600.00 600.00	300.00 300.00	6/30/2023 6/30/2023	Board Stipend - 06.01.23-06.30.23 Board Stipend - 06.01.23-06.30.23	900-Operations 900-Operations	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner
6/25/2023	6/25/2023	5386-062523	5386-Steve Fraire 5386-Steve Fraire	5800-Professional Services - 5800-Professional Services -	20136003341 20136003341	600.00 600.00	300.00 300.00	6/30/2023 6/30/2023	Board Stipend - 06.01.23-06.30.23 Board Stipend - 06.01.23-06.30.23	900-Operations 900-Operations	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner
6/25/2023	6/25/2023	5390-062523	5390-Susan Houle 5390-Susan Houle	5800-Professional Services - 5800-Professional Services -	20136003341 20136003341	600.00 600.00	300.00 300.00	6/30/2023 6/30/2023	Board Stipend - 06.01.23-06.30.23 Board Stipend - 06.01.23-06.30.23	900-Operations 900-Operations	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner
6/25/2023	6/25/2023	5427-062523	5427-William Hall 5427-William Hall	5800-Professional Services - 5800-Professional Services -	20136003341 20136003341	600.00 600.00	300.00 300.00	6/30/2023 6/30/2023	Board Stipend - 06.01.23-06.30.23 Board Stipend - 06.01.23-06.30.23	900-Operations 900-Operations	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale
6/26/2023	6/26/2023	5370-061023	5370-SchoolsFirst 5370-SchoolsFirst	9517-Voluntary 403b 9517-Voluntary 403b	20136003341 20136003341	670.14 670.14	442.30 227.84	6/30/2023 6/30/2023	403B/457B - 06.10.23 Payroll Regular 403B/457B - 06.10.23 Payroll Regular	000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale
6/26/2023	6/26/2023	5795-062523	5795-BRMS - FSA 5795-BRMS - FSA 5795-BRMS - FSA 5795-BRMS - FSA 5795-BRMS - FSA 5795-BRMS - FSA 5795-BRMS - FSA 5795-BRMS - FSA 5795-BRMS - FSA	9516-Voluntary FSA 9516-Voluntary FSA 9516-Voluntary FSA 9516-Voluntary FSA 9516-Voluntary FSA 9516-Voluntary FSA 9516-Voluntary FSA 9516-Voluntary FSA 9516-Voluntary FSA	20136006010 20136006010 20136006010 20136006010 20136006010 20136006010 20136006010 20136006010 20136006010	351.64 351.64 351.64 351.64 351.64 351.64 351.64 351.64 351.64	27.98 109.70 54.30 56.51 39.63 28.45 29.41 14.66	6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023 6/30/2023	Tabeth Gomez Lorrie Wood Tabeth Gomez Lorrie Wood April Saade Sarah Horikawa April Saade Sarah Horikawa	000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale
6/26/2023	6/26/2023	5367-062623	5367-San Bernardino Superintendent Of School	9525-STRS	30069	76,428.32	76,428.32	6/30/2023		000-Schoolwide -Revenues/BS Accounts	2073-Excel Academy Charter School - Helendale
6/27/2023	6/20/2023	B-267503571	2372-Outschool 2372-Outschool	5880-Instructional Vendors & 5880-Instructional Vendors &	10136006010 10136006010	7,085.34 7,085.34	4,437.34 2,648.00	In Transit In Transit	910-Instructional Funds 910-Instructional Funds	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
6/27/2023	3/31/2023 5/25/2023 5/25/2023	43584 44784 44782	5353-Partners in Special Education 5353-Partners in Special Education 5353-Partners in Special Education	5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven	10136006017 10136006017 10136006017	5,427.50 5,427.50 5,427.50	487.50 552.50 487.50	In Transit In Transit In Transit	Nursing Assessment Counseling Services ERMHS Eval and Nursing	907-Special Education 907-Special Education 907-Special Education	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

			5353-Partners in Special Education	5100-SpEd Consultants and Ven	10136006017	5,427.50	422.50	In Transit	Counseling Services	907-Special Education	2073-Excel Academy Charter School - Helendale	
6/16/2023	45212		5353-Partners in Special Education	5100-SpEd Consultants and Ven	10136006017	5,427.50	32.50	In Transit	Nursing	907-Special Education	2073-Excel Academy Charter School - Helendale	
			5353-Partners in Special Education	5100-SpEd Consultants and Ven	10136006017	5,427.50	1,072.50	In Transit	ERMHS Eval	907-Special Education	2053-Excel Academy Charter School - Warner	
			5353-Partners in Special Education	5100-SpEd Consultants and Ven	10136006017	5,427.50	1,105.00	In Transit	Counseling Services	907-Special Education	2073-Excel Academy Charter School - Helendale	
6/16/2023	45215		5353-Partners in Special Education	5100-SpEd Consultants and Ven	10136006017	5,427.50	65.00	In Transit	Nursing	907-Special Education	2073-Excel Academy Charter School - Helendale	
			5353-Partners in Special Education	5100-SpEd Consultants and Ven	10136006017	5,427.50	585.00	In Transit	Counseling Services	907-Special Education	2073-Excel Academy Charter School - Helendale	
			5353-Partners in Special Education	5100-SpEd Consultants and Ven	10136006017	5,427.50	617.50	In Transit	Nursing	907-Special Education	2073-Excel Academy Charter School - Helendale	
6/27/2023		3/31/2023	EXCL02-0323	5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven	10136006019	4,355.00	400.00	In Transit	OT Services	907-Special Education	2053-Excel Academy Charter School - Warner
				5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven	10136006019	4,355.00	1,250.00	In Transit	Counseling Services	907-Special Education	2053-Excel Academy Charter School - Warner
4/30/2023	423		5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven	10136006019	4,355.00	440.00	In Transit	Speech Services	907-Special Education	2053-Excel Academy Charter School - Warner	
				5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven	10136006019	4,355.00	36.25	In Transit	AT Services	907-Special Education	2073-Excel Academy Charter School - Helendale
4/30/2023	EXCL02-0423		5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven	10136006019	4,355.00	543.75	In Transit	Speech Services	907-Special Education	2053-Excel Academy Charter School - Warner	
				5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven	10136006019	4,355.00	325.00	In Transit	OT Services	907-Special Education	2053-Excel Academy Charter School - Warner
				5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven	10136006019	4,355.00	260.00	In Transit	Speech Services	907-Special Education	2053-Excel Academy Charter School - Warner
				5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven	10136006019	4,355.00	1,100.00	In Transit	Counseling Services	907-Special Education	2053-Excel Academy Charter School - Warner
6/27/2023		4/30/2023	10604	5162-Effectual Educational Consulting Services	5100-SpEd Consultants and Ven	10136006022	2,936.25	440.00	In Transit	Counseling Services	907-Special Education	2053-Excel Academy Charter School - Warner
				5162-Effectual Educational Consulting Services	5100-SpEd Consultants and Ven	10136006022	2,936.25	218.75	In Transit	DH Services	907-Special Education	2053-Excel Academy Charter School - Warner
5/31/2023	10160		5162-Effectual Educational Consulting Services	5100-SpEd Consultants and Ven	10136006022	2,936.25	330.00	In Transit	Counseling Services	907-Special Education	2053-Excel Academy Charter School - Warner	
5/31/2023	10159		5162-Effectual Educational Consulting Services	5100-SpEd Consultants and Ven	10136006022	2,936.25	902.50	In Transit	DH, Nurs, AT Services	907-Special Education	2053-Excel Academy Charter School - Warner	
				5162-Effectual Educational Consulting Services	5100-SpEd Consultants and Ven	10136006022	2,936.25	1,045.00	In Transit	Counseling	907-Special Education	2053-Excel Academy Charter School - Warner
6/27/2023		5/31/2023	16045	v3100-Oxford Consulting Services, Inc.	5100-SpEd Consultants and Ven	10136006015	2,720.39	1,523.75	In Transit	BIS and PT Services	907-Special Education	2053-Excel Academy Charter School - Warner
				v3100-Oxford Consulting Services, Inc.	5100-SpEd Consultants and Ven	10136006015	2,720.39	872.64	In Transit	Counseling Services	907-Special Education	2053-Excel Academy Charter School - Warner
5/31/2023	16046		v3100-Oxford Consulting Services, Inc.	5100-SpEd Consultants and Ven	10136006015	2,720.39	324.00	In Transit	Counseling Services	907-Special Education	2073-Excel Academy Charter School - Helendale	
6/27/2023		6/7/2023	284-255499-5	1376-EMH Sports USA, Inc.	5100-SpEd Consultants and Ven	10136006005	2,208.75	2,208.75	In Transit	APE Services	907-Special Education	2053-Excel Academy Charter School - Warner
6/27/2023		6/27/2023	6348860	5411-Total Education Solutions	5100-SpEd Consultants and Ven	10136006012	2,000.00	450.00	In Transit	APE Services	907-Special Education	2053-Excel Academy Charter School - Warner
				5411-Total Education Solutions	5100-SpEd Consultants and Ven	10136006012	2,000.00	450.00	In Transit	APE Services	907-Special Education	2073-Excel Academy Charter School - Helendale
				5411-Total Education Solutions	5100-SpEd Consultants and Ven	10136006012	2,000.00	1,100.00	In Transit	APE Services and Eval	907-Special Education	2053-Excel Academy Charter School - Warner
6/27/2023		5/31/2023	35431	5257-Jump and Schout Therapy, Inc.	5100-SpEd Consultants and Ven	10136006021	1,530.00	360.00	In Transit	OT Services	907-Special Education	2073-Excel Academy Charter School - Helendale
				5257-Jump and Schout Therapy, Inc.	5100-SpEd Consultants and Ven	10136006021	1,530.00	480.00	In Transit	Speech Services	907-Special Education	2073-Excel Academy Charter School - Helendale
5/31/2023	35430		5257-Jump and Schout Therapy, Inc.	5100-SpEd Consultants and Ven	10136006021	1,530.00	690.00	In Transit	Speech Services	907-Special Education	2073-Excel Academy Charter School - Helendale	
6/27/2023		5/2/2023	3551	5556-Small Talk OC	5100-SpEd Consultants and Ven	10136006014	1,125.00	1,125.00	In Transit	Speech Services	907-Special Education	2053-Excel Academy Charter School - Warner
6/27/2023		6/15/2023	EX2023.05	5400-Therapy in Action	5100-SpEd Consultants and Ven	10136006020	660.00	660.00	In Transit	OT Services	907-Special Education	2073-Excel Academy Charter School - Helendale
6/27/2023		6/6/2023	May-23	6022-Newport Beach Developmental Optometi	5100-SpEd Consultants and Ven	10136006016	600.00	600.00	In Transit	Vision Therapy	907-Special Education	2053-Excel Academy Charter School - Warner
6/27/2023		6/7/2023	284-255500-5	1376-EMH Sports USA, Inc.	5100-SpEd Consultants and Ven	10136006018	522.50	522.50	In Transit	907-Special Education	907-Special Education	2073-Excel Academy Charter School - Helendale
6/27/2023		4/30/2023	10605	5162-Effectual Educational Consulting Services	5100-SpEd Consultants and Ven	10136006009	260.00	260.00	In Transit	OI Consultation Services	907-Special Education	2053-Excel Academy Charter School - Warner
6/27/2023		6/2/2023	156	5302-Little Ears Therapy Center	5100-SpEd Consultants and Ven	10136006013	200.00	200.00	In Transit	Speech Services	907-Special Education	2073-Excel Academy Charter School - Helendale
6/27/2023		6/20/2023	B-267503565	4156-Gracie Barra San Clemente	5880-Instructional Vendors &	10136006007	196.00	196.00	In Transit	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/27/2023		6/22/2023	May-23	5765-Horizon Therapy Services	5100-SpEd Consultants and Ven	10136006011	180.00	180.00	In Transit	OT Services	907-Special Education	2073-Excel Academy Charter School - Helendale
6/17/2023		6/12/2023	00003E01V5243	1649-LPS	5930-Postage	10136006008	66.89	22.74	In Transit	907-Special Education	907-Special Education	2073-Excel Academy Charter School - Helendale
				1649-LPS	5930-Postage	10136006008	66.89	44.15	In Transit	900-Operations	900-Operations	2053-Excel Academy Charter School - Warner
6/28/2023		6/28/2023	5427-062823	5427-William Hall	5800-Professional Services -	5800-Professional Services -	450.00	225.00	In Transit	oard Stipend - 06.01.23-06.30.23 H Gasca Eval	900-Operations	2073-Excel Academy Charter School - Helendale
				5427-William Hall	5800-Professional Services -	5800-Professional Services -	450.00	225.00	In Transit	oard Stipend - 06.01.23-06.30.23 H Gasca Eval	900-Operations	2053-Excel Academy Charter School - Warner
6/28/2023		6/28/2023	5289-062823	5289-Larry Alvarado	5800-Professional Services -	5800-Professional Services -	450.00	225.00	In Transit	oard Stipend - 06.01.23-06.30.23 H Gasca Eval	900-Operations	2053-Excel Academy Charter School - Warner
				5289-Larry Alvarado	5800-Professional Services -	5800-Professional Services -	450.00	225.00	In Transit	oard Stipend - 06.01.23-06.30.23 H Gasca Eval	900-Operations	2073-Excel Academy Charter School - Helendale
6/28/2023		2/28/2023	INV-BkLAU-4915	5058-Blake eLearning Pty Ltd	4100-Textbooks & Core Curricu	10136005000	-69.99	-69.99	6/30/2023	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/28/2023		3/7/2023	INV-BkLAU-4945	5058-Blake eLearning Pty Ltd	4100-Textbooks & Core Curricu	10136005091	-69.99	-69.99	6/30/2023	910-Instructional Funds	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/28/2023		3/22/2023	INV-BkLAU-4965	5058-Blake eLearning Pty Ltd	4100-Textbooks & Core Curricu	10136005262	-30.00	-30.00	6/30/2023	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/28/2023		4/4/2023	INV-BkLAU-5009	5058-Blake eLearning Pty Ltd	4100-Textbooks & Core Curricu	10136005387	-99.99	-99.99	6/30/2023	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/28/2023		6/18/2023	B-267503573	2769-Preston's Piano Studio	5880-Instructional Vendors &	20136003373	1,554.00	1,554.00	6/30/2023	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/28/2023		6/17/2023	B-267503567	2047-Jennifer Walton	5880-Instructional Vendors &	20136003374	910.00	910.00	6/30/2023	910-Instructional Funds	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/28/2023		6/15/2023	B-267503564	1414-Fun On The Farm Inc., DBA Fun With Hrs	5880-Instructional Vendors &	20136003377	640.00	640.00	6/30/2023	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/28/2023		6/19/2023	B-267503568	2244-Miss Crady the Math Lady	5880-Instructional Vendors &	20136003375	600.00	600.00	6/30/2023	910-Instructional Funds	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/28/2023		6/15/2023	B-267503572	v3083-Barnassus Preparatory Academy	5880-Instructional Vendors &	20136003378	200.00	200.00	6/30/2023	910-Instructional Funds	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/28/2023		6/20/2023	B-267503570	5545-Oksana Kalihuka dba OC Dancing	5880-Instructional Vendors &	20136003372	184.94	184.94	6/30/2023	910-Instructional Funds	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
6/28/2023		6/15/2023	B-267503569	2877-Nataly Jewel	5880-Instructional Vendors &	20136003376	82.50	82.50	6/30/2023	910-Instructional Funds	910-Instructional Funds	2073-Excel Academy Charter School - Warner
6/28/2023		6/20/2023	1R3G-TJ77-1K3F	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003371	1.00	1.00	6/30/2023	906-Education Services	906-Education Services	2073-Excel Academy Charter School - Helendale
6/29/2023		6/29/2023	6097-063023	6097-Debra Routtree	9521-Accrued Salary & Wages	30070	3,386.63	2,235.18	In Transit	000-Schoolwide -Revenues/BS Accounts	000-Schoolwide -Revenues/BS Accounts	2053-Excel Academy Charter School - Warner
				6097-Debra Routtree	9521-Accrued Salary & Wages	30070	3,386.63	1,151.45	In Transit	000-Schoolwide -Revenues/BS Accounts	000-Schoolwide -Revenues/BS Accounts	2073-Excel Academy Charter School - Warner
6/29/2023		6/26/2023	850311	5363-Procopio, Cory, Hargreaves & Savitch LL	5810-Legal	10136006025	7,160.40	338.58	In Transit	900-Operations	900-Operations	2053-Excel Academy Charter School - Warner
				5363-Procopio, Cory, Hargreaves & Savitch LL	5810-Legal	10136006025	7,160.40	174.42	In Transit	900-Operations	900-Operations	2073-Excel Academy Charter School - Helendale
6/20/2023	849598		5363-Procopio, Cory, Hargreaves & Savitch LL	5810-Legal	10136006025	7,160.40	869.42	In Transit	900-Operations	900-Operations	2053-Excel Academy Charter School - Warner	
				5363-Procopio, Cory, Hargreaves & Savitch LL	5810-Legal	10136006025	7,160.40	447.88	In Transit	900-Operations	900-Operations	2073-Excel Academy Charter School - Helendale
6/20/2023	849611		5363-Procopio, Cory, Hargreaves & Savitch LL	5810-Legal	10136006025	7,160.40	3,517.87	In Transit	900-Operations	900-Operations	2053-Excel Academy Charter School - Warner	
				5363-Procopio, Cory, Hargreaves & Savitch LL	5810-Legal	10136006025	7,160.40	1,812.23	In Transit	900-Operations	900-Operations	2073-Excel Academy Charter School - Helendale
6/29/2023		2/28/2023	INV-BkLAU-4915	5058-Blake eLearning Pty Ltd	4100-Textbooks & Core Curricu	10136006024	269.97	69.99	In Transit	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
				5058-Blake eLearning Pty Ltd	4100-Textbooks & Core Curricu	10136006024	269.97	69.99	In Transit	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/7/2023		3/22/2023	INV-BkLAU-4965	5058-Blake eLearning Pty Ltd	4100-Textbooks & Core Curricu	10136006024	269.97	30.00	In Transit	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/4/2023			INV-BkLAU-5009	5058-Blake eLearning Pty Ltd	4100-Textbooks & Core Curricu	10136006024	269.97	99.99	In Transit	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
6/29/2023		6/20/2023	B-267503574	1938-Brittany Doan	5880-Instructional Vendors &	10136006023	116.25	116.25	In Transit	910-Instructional Funds	910-Instructional Funds	2053-Excel Academy Charter School - Warner
Total for CHASE 9313							520,972.07	520,972.07				

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

Company name: Excel Academy Charter Schools
 Check register
 Report name: 2053--Excel Academy Charter School - Warner & 2073--Excel Academy Charter School - Helendale
 Location: 2053--Excel Academy Charter School - Warner & 2073--Excel Academy Charter School - Helendale

Bank	Entity	Bill date	Bill no.	Vendor	GL account or account label	Document no.	Amount	Amount applied	Cleared	Memo	Department	Location
CHASE 9313 - Chase Bank	Account no: 215769313											
		7/10/2023	2089-072023	5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE	3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments	2013600384 2013600384 2013600384	120,349.78 120,349.78 120,349.78	11,674.22 67,757.25 34,924.46	In Transit In Transit In Transit		000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
		7/10/2023	20230076	5564--Parsec Education 5564--Parsec Education	5800--Professional Services - 5800--Professional Services -	10136006044 10136006044	14,542.60 14,542.60	4,944.48 9,598.12	In Transit In Transit		903--Assessment 903--Assessment	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		7/10/2023	US414444	5455--BrainPOP 5455--BrainPOP	4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	10136006031 10136006031	3,607.50 3,607.50	2,380.95 1,226.55	In Transit In Transit		906--Education Services 906--Education Services	2053--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Warner
		7/10/2023	1882	6085--Writing by Design 6085--Writing by Design	4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	10136006039 10136006039	2,933.95 2,933.95	1,936.41 997.54	In Transit In Transit		906--Education Services 906--Education Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		7/10/2023	850704	5363--Procopio, Cory, Hargreaves & Savitch LL 5363--Procopio, Cory, Hargreaves & Savitch LL	5810--Legal 5810--Legal	10136006043 10136006043	2,800.00 2,800.00	952.00 1,848.00	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		5/8/2023	R4788	5106--City of Brea 5106--City of Brea	5841--Community Marketing 5841--Community Marketing	10136006042 10136006042	2,350.00 2,350.00	799.00 1,551.00	In Transit In Transit		914--Community Engagement 914--Community Engagement	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		5/31/2023	INV-0108-DRMFT	3234--California Pacific Charter Schools 3234--California Pacific Charter Schools	5890--Misc Other Outside Servi 5890--Misc Other Outside Servi	20136003379 20136003379	2,070.03 2,070.03	1,366.22 703.81	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		7/10/2023	INV74036	5567--Vector Solutions 5567--Vector Solutions	5895--Professional Development 5895--Professional Development	20136003380 20136003380	1,800.00 1,800.00	612.00 1,188.00	In Transit In Transit		901--Human Resources 901--Human Resources	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		7/10/2023	160732	v3171--Generation Genius, Inc. v3171--Generation Genius, Inc.	4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	10136006028 10136006028	1,795.00 1,795.00	1,184.70 610.30	In Transit In Transit		906--Education Services 906--Education Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		7/10/2023	63540	5823--Everyday Speech LLC 5823--Everyday Speech LLC	4350--Other Supplies - Materia 4350--Other Supplies - Materia	10136006027 10136006027	851.97 851.97	562.30 289.67	In Transit In Transit		907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		7/10/2023	INV-1065317	99991--NZY LLC 99991--NZY LLC	4350--Other Supplies - Materia 4350--Other Supplies - Materia	10136006035 10136006035	699.99 699.99	461.99 238.00	In Transit In Transit		907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		6/26/2023	1396	5917--San Joaquin County Office of Education 5917--San Joaquin County Office of Education	5200--Travel & Conferences 5200--Travel & Conferences	10136006030 10136006030	650.00 650.00	429.00 221.00	In Transit In Transit		907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		5/22/2023	6.873E+13	5601--Atkinson, Anderson, Loya, Raud & Romo 5601--Atkinson, Anderson, Loya, Raud & Romo	5895--Professional Development 5895--Professional Development	10136006037 10136006037	438.00 438.00	74.46 144.54	In Transit In Transit		907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		5/22/2023	6.873E+13	5601--Atkinson, Anderson, Loya, Raud & Romo 5601--Atkinson, Anderson, Loya, Raud & Romo	5895--Professional Development 5895--Professional Development	10136006037 10136006037	438.00 438.00	74.46 144.54	In Transit In Transit		907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		7/10/2023	INV45981	5313--LogCopy 5313--LogCopy	5800--Professional Services - 5800--Professional Services -	10136006036 10136006036	418.77 418.77	142.38 276.39	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		5/31/2023	W130998-IN	5756--School Services of California, Inc. 5756--School Services of California, Inc.	5895--Professional Development 5895--Professional Development	10136006029 10136006029	295.00 295.00	194.70 100.30	In Transit In Transit		909--Business Services 909--Business Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		7/10/2023	FSA-2089-072023	5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA	3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments	20136003382 20136003382 20136003382 20136003382	250.00 250.00 250.00 250.00	20.00 65.00 38.82 126.18	In Transit In Transit In Transit In Transit		000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
		7/10/2023	RK62923EX	5944--Raddish Kids	4100--Textbooks & Core Curricu	10136006032	167.77	167.77	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/10/2023	267329929	5553--Active Kids	4100--Textbooks & Core Curricu	20136003383	164.95	164.95	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		6/28/2023	2842546964	1376--EMH Sports USA, Inc.	5100--SpitD Consultants and Ven	10136006026	118.75	118.75	In Transit		907--Special Education	APE Services 2053--Excel Academy Charter School - Warner
		6/21/2023	INVNOICE-224661	5566--Notable Inc. 5566--Notable Inc.	4350--Other Supplies - Materia 4350--Other Supplies - Materia	10136006034 10136006034	99.00 99.00	65.34 33.66	In Transit In Transit		907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		6/24/2023	00002E01V5253	1649--LPS 1649--LPS	5930--Postage 5930--Postage	10136006041 10136006041	98.42 98.42	64.96 33.46	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		6/13/2023	1252899	5461--Pioneer Valley Educational Press 5461--Pioneer Valley Educational Press	4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	10136006040 10136006040	80.00 80.00	27.20 52.80	In Transit In Transit		908--Intervention/Title I 908--Intervention/Title I	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		6/12/2023	14224	5017--Alpha Vision, Inc. 5017--Alpha Vision, Inc.	5940--Technology Services 5940--Technology Services	10136006038 10136006038	75.00 75.00	25.50 49.50	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		6/27/2023	1221236	5892--Bachhalter 5892--Bachhalter	5810--Legal 5810--Legal	20136003381 20136003381	64.50 64.50	42.57 21.93	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		5/19/2023	36337139	6064--Crown Awards 6064--Crown Awards	4320--Office Supplies 4320--Office Supplies	10136006033 10136006033	8.82 8.82	3.00 5.82	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		7/11/2023	25403101	5911--4imprint, Inc. 5911--4imprint, Inc.	5841--Community Marketing 5841--Community Marketing	10136006058 10136006058	8,662.95 8,662.95	2,945.40 5,717.55	In Transit In Transit		913--Marketing 913--Marketing	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		6/7/2023	B.E79503	5728--The Grand Long Beach 5728--The Grand Long Beach	5610--Facility Rents & Leases 5610--Facility Rents & Leases	10136006059 10136006059	5,791.34 5,791.34	1,969.06 3,822.28	In Transit In Transit		906--Education Services 906--Education Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		6/21/2023	INV-T11-22164	3369--TurnItIn, LLC 3369--TurnItIn, LLC	4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	10136006051 10136006051	4,838.00 4,838.00	3,193.08 1,644.92	In Transit In Transit		906--Education Services 906--Education Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		7/11/2023	2	6065--Carly Stone 6065--Carly Stone	5841--Community Marketing 5841--Community Marketing	20136003387 20136003387	4,800.00 4,800.00	3,168.00 1,632.00	In Transit In Transit		913--Marketing 913--Marketing	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		7/7/2023	3796761	5108--CliftonLarsonAllen LLP 5108--CliftonLarsonAllen LLP	5820--Audit & CPA 5820--Audit & CPA	10136006047 10136006047	3,780.00 3,780.00	1,285.20 2,494.80	In Transit In Transit		909--Business Services 909--Business Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		6/30/2023	INV-0111	3234--California Pacific Charter Schools 3234--California Pacific Charter Schools	5890--Misc Other Outside Servi 5890--Misc Other Outside Servi	20136003386 20136003386	2,135.63 2,135.63	1,409.52 726.11	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		6/28/2023	9938359843	5421--Verizon Wireless 5421--Verizon Wireless	5910--Telephone 5910--Telephone	10136006056 10136006056	1,419.45 1,419.45	936.84 482.61	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		7/9/2023	5359-070923	5359--Ritney Boves 5359--Ritney Boves	5930--Postage 5930--Postage	20136003385 20136003385	1,168.95 1,168.95	397.44 771.51	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		6/29/2023	1889	6085--Writing by Design 6085--Writing by Design	4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	10136006046 10136006046	993.01 993.01	337.62 655.39	In Transit In Transit		906--Education Services 906--Education Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
		7/11/2023	609034135	6015--Granite Telecommunications 6015--Granite Telecommunications	5910--Telephone 5910--Telephone	10136006049 10136006049	751.68 751.68	496.11 255.57	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
		6/24/2023	5121-072423	5121--Cox Business	5910--Telephone	10136006048	695.60	459.10	In Transit		912--Administration/Office	2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

			5121--Cox Business		5910--Telephone	1013600648	695.60	236.50	In Transit		912--Administration/Office	2073--Excel Academy Charter School - Helendale
7/11/2023	7/10/2023	25395722	5911--4imprint, Inc. 5911--4imprint, Inc.		5841--Community Marketing 5841--Community Marketing	1013600650 1013600650	676.97 676.97	230.17 446.80	In Transit In Transit		913--Marketing 913--Marketing	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/17/2023	6/26/2023	W131577-IN	5756--School Services of California, Inc. 5756--School Services of California, Inc.		5895--Professional Development 5895--Professional Development	1013600657 1013600657	550.00 550.00	93.50 181.50	In Transit In Transit		907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	6/26/2023	W131576-IN	5756--School Services of California, Inc. 5756--School Services of California, Inc.		5895--Professional Development 5895--Professional Development	1013600657 1013600657	550.00 550.00	93.50 181.50	In Transit In Transit		909--Business Services 909--Business Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/17/2023	7/1/2023	14233	5017--Alpha Vision, Inc. 5017--Alpha Vision, Inc.		5940--Technology Services 5940--Technology Services	1013600645 1013600645	379.00 379.00	128.86 250.14	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/17/2023	7/7/2023	INV-02920-A	5776--Albom Translation Service 5776--Albom Translation Service		5800--Professional Services - 5800--Professional Services -	1013600654 1013600654	150.00 150.00	51.00 99.00	In Transit In Transit		906--Education Services 906--Education Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/17/2023	7/10/2023	30071023	5522--KM Educational Consulting & Executive C 5522--KM Educational Consulting & Executive C		5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	2013600388 2013600388	150.00 150.00	99.00 51.00	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
7/17/2023	6/30/2023	14970026	5296--LEAF 5296--LEAF		5620--Equipment Leases 5620--Equipment Leases	1013600653 1013600653	143.86 143.86	94.95 48.91	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
7/17/2023	7/2/2023	00002E01V5263	1649--LPS 1649--LPS		5930--Postage 5930--Postage	1013600652 1013600652	92.85 92.85	9.07 17.61	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	7/8/2023	00002E01V5273	1649--LPS 1649--LPS		5930--Postage 5930--Postage	1013600652 1013600652	92.85 92.85	22.50 43.67	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/17/2023	7/12/2023	INV46117	5313--LogCopy 5313--LogCopy		5800--Professional Services - 5800--Professional Services -	1013600655 1013600655	44.20 44.20	15.03 29.17	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/21/2023	7/20/2023	6114-072023	6114--Stacey Fitzpatrick 6114--Stacey Fitzpatrick		9521--Accrued Salary & Wages 9521--Accrued Salary & Wages	30071 30071	70.66 70.66	44.64 24.02	In Transit In Transit		000--Schoolwide -Revenues/BS Accounts 000--Schoolwide -Revenues/BS Accounts	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
7/23/2023	7/23/2023	5696-072323	5696--JP Morgan Chase Bank NA 5696--JP Morgan Chase Bank NA 5696--JP Morgan Chase Bank NA 5696--JP Morgan Chase Bank NA		9501--Accounts Payable - Purch 9501--Accounts Payable - Purch 9501--Accounts Payable - Purch 9501--Accounts Payable - Purch	12,441.15 12,441.15 12,441.15 12,441.15	559.55 7,089.35 3,706.07 1,086.18		In Transit In Transit In Transit In Transit	Chase Purchase Card 06.01.23-06.30.23 Chase Purchase Card 06.01.23-06.30.23 Chase Purchase Card 06.01.23-06.30.23 Chase Purchase Card 06.01.23-06.30.23	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
7/24/2023	7/5/2023	SNW6367	3210--Bright Thinker 3210--Bright Thinker		4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	1013600601 1013600601	61,499.00 61,499.00	20,910.00 40,589.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/24/2023	6/9/2023	B-267502508	2749--Circle City School Enrichment Program		5880--Instructional Vendors &	1013600663	4,681.00	4,681.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	6/9/2023	B-267502499	5512--Amber Lee		5880--Instructional Vendors &	1013600667	1,699.40	1,699.40	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	7/5/2023	5366-070523	5366--Sage Oaks Charter School		9516--Voluntary FSA	1013600677	1,117.78	1,117.78	In Transit		000--Schoolwide -Revenues/BS Accounts	2053--Excel Academy Charter School - Warner
7/24/2023	6/8/2023	B-267502502	1424--California Gymnastics, LLC 1424--California Gymnastics, LLC		5880--Instructional Vendors & 5880--Instructional Vendors &	1013600674 1013600674	1,037.50 1,037.50	895.00 142.50	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
7/24/2023	6/8/2023	B-267502514	2174--Gracie Barra Corona		5880--Instructional Vendors &	1013600666	776.00	776.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	6/8/2023	B-267502521	2144--Waterworks Aquatics Pasadena		5880--Instructional Vendors &	1013600669	616.50	616.50	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
7/24/2023	6/8/2023	B-267502509	2857--James Lowe		5880--Instructional Vendors &	1013600673	583.33	583.33	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	6/9/2023	B-267502507	1998--Cynthia Abts		5880--Instructional Vendors &	1013600671	360.00	360.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	6/8/2023	B-267502523	5649--Waterworks Swim School Yorba Linda		5880--Instructional Vendors &	1013600672	348.00	348.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	6/8/2023	B-267502515	2383--Guitar Ninjas		5880--Instructional Vendors &	1013600676	192.16	192.16	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
7/24/2023	6/9/2023	B-267502512	6007--EuroGymnastics, Inc.		5880--Instructional Vendors &	1013600662	150.00	150.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	6/8/2023	B-267502500	5996--Belmont Music Studio Music Lessons		5880--Instructional Vendors &	1013600665	135.00	135.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
7/24/2023	7/5/2023	5446-070523	5446--Motivated Youth Academy		9516--Voluntary FSA	1013600675	104.79	104.79	In Transit		000--Schoolwide -Revenues/BS Accounts	2053--Excel Academy Charter School - Warner
7/24/2023	6/9/2023	B-267502520	1413--Orange County Ki Society		5880--Instructional Vendors &	1013600679	104.00	104.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	6/8/2023	B-267502522	5919--Waterworks Swim School La Habra		5880--Instructional Vendors &	1013600660	96.00	96.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/24/2023	6/8/2023	B-267502510	2192--Drawn2K1 Northridge		5880--Instructional Vendors &	1013600668	94.00	94.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
7/24/2023	7/8/2023	17027	1243--JackRis Publishing, LLC 1243--JackRis Publishing, LLC		4310--Materials & Supplies 4310--Materials & Supplies	1013600678 1013600678	75.88 75.88	25.80 50.08	In Transit In Transit		906--Education Services 906--Education Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/24/2023	7/15/2023	00002E01V5283	1649--LPS 1649--LPS		5930--Postage 5930--Postage	1013600604 1013600604	7.87 7.87	5.19 2.68	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
7/25/2023	6/16/2023	1M3P-RW1-6K9T	1925--Amazon Capital Services, Inc. 1925--Amazon Capital Services, Inc.		5300--Dues & Memberships 5300--Dues & Memberships	2013600393 2013600393	3,746.73 3,746.73	1,279.02 2,467.71	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
7/25/2023	6/8/2023	B-267502518	1988--Joe Ferrante Music Academy		5880--Instructional Vendors &	2013600395	1,486.00	1,486.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
7/25/2023	3/31/2023	1205289	5892--Buchhalter 5892--Buchhalter		5810--Legal 5810--Legal	2013600389 2013600389	799.01 799.01	104.76 202.37	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	5/31/2023	1218168	5892--Buchhalter 5892--Buchhalter		5810--Legal 5810--Legal	2013600389 2013600389	799.01 799.01	25.29 49.09	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	4/30/2023	1211731	5892--Buchhalter 5892--Buchhalter		5810--Legal 5810--Legal	2013600389 2013600389	799.01 799.01	274.89 141.61	In Transit In Transit		912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
7/25/2023	7/5/2023	3234-070523	3234--California Pacific Charter Schools		9516--Voluntary FSA	2013600398	558.89	558.89	In Transit		000--Schoolwide -Revenues/BS Accounts	2053--Excel Academy Charter School - Warner
7/25/2023	6/9/2023	B-267502519	4186--Kidz Golf Club		5880--Instructional Vendors &	2013600394	395.00	395.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/25/2023	6/9/2023	B-267502513	4174--ForteRano Music School		5880--Instructional Vendors &	2013600397	310.00	310.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/25/2023	6/8/2023	B-267502517	1652--Hangar 18 Upland, Inc		5880--Instructional Vendors &	2013600396	294.00	294.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
7/25/2023	6/8/2023	B-267502503	2802--Carrie a Tune		5880--Instructional Vendors &	2013600390	240.00	240.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/25/2023	6/8/2023	B-267502516	5489--Hangar 18 Mission Viejo		5880--Instructional Vendors &	2013600399	110.00	110.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/25/2023	6/8/2023	B-267502501	5829--Broadway Gymnastics School		5880--Instructional Vendors &	2013600391	84.00	84.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
7/25/2023	6/9/2023	B-267502511	2269--Dunamik Dance Project, Inc		5880--Instructional Vendors &	2013600392	42.50	42.50	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
7/28/2023	7/27/2023	5367-072723	5367--San Bernardino Superintendent Of Schoo		9525--STAS	30072	14,126.83	14,126.83	In Transit		000--Schoolwide -Revenues/BS Accounts	2073--Excel Academy Charter School - Helendale

Total for CHASE 9313

302,336.27 302,336.27

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

Company name: Excel Academy Charter Schools
 Report name: Check register
 Location: 2053--Excel Academy Charter School - Warner & 2073--Excel Academy Charter School - Helendale

Bank	Bank	Bill date	Bill no.	Vendor	GL account or account label	Document no.	Amount	Amount applied	Cleared	Memo	Department	Location	
CHASE 9313 - Chase Bank	Account no: 215769313												
	8/1/2023	2023-0481		4303-Mobile Zoo of Southern California 4303-Mobile Zoo of Southern California	5841-Community Marketing 5841-Community Marketing	10136006104 10136006104	649.00 649.00	428.34 220.66	In Transit In Transit		914-Community Engagement 914-Community Engagement	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/7/2023	7/7/2023	HW61076	5450-PresenceLearning 5450-PresenceLearning	5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven	10136006083 10136006083	12,390.00 12,390.00	4,336.60 8,053.40	In Transit In Transit	Technology Platform Technology Platform	907-Special Education 907-Special Education	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	7/27/2023	853803	5363-Procopo, Cory, Hargreaves & Savitch LL 5363-Procopo, Cory, Hargreaves & Savitch LL	5810-Legal 5810-Legal	10136006088 10136006088	10,024.10 10,024.10	104.48 202.82	In Transit In Transit		912-Administration/Office 912-Administration/Office	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	7/27/2023	853798	5363-Procopo, Cory, Hargreaves & Savitch LL 5363-Procopo, Cory, Hargreaves & Savitch LL	5810-Legal 5810-Legal	10136006088 10136006088	10,024.10 10,024.10	3,303.71 6,413.09	In Transit In Transit		912-Administration/Office 912-Administration/Office	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	7/10/2023	140-INVS124	5368-School Pathways, LLC	5830-Non-Instructional Softwa	10136006086	9,428.05	9,428.05	In Transit		912-Administration/Office	2073-Excel Academy Charter School - Helendale	
	8/7/2023	5/31/2023	523	5378-Specialized Therapy Services, Inc. 5378-Specialized Therapy Services, Inc. 5378-Specialized Therapy Services, Inc. 5378-Specialized Therapy Services, Inc. 5378-Specialized Therapy Services, Inc. 5378-Specialized Therapy Services, Inc.	5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven	10136006103 10136006103 10136006103 10136006103 10136006103 10136006103	2,883.75 325.00 2,883.75 2,883.75 2,883.75 2,883.75	450.00 325.00 443.75 568.75 200.00 280.00	In Transit In Transit In Transit In Transit In Transit In Transit	ERMIS Services- May 22-23 907-Special Education Speech Services- May 22-23 AT & OT Services- May 22-23 907-Special Education ESY Speech Services Speech Services AT Services	907-Special Education 907-Special Education 907-Special Education 907-Special Education 907-Special Education 907-Special Education	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2073-Excel Academy Charter School - Helendale	
	8/7/2023	7/18/2023	E23-128884	6070-Taste 6070-Taste	4330-Meals & Events 4330-Meals & Events	10136006087 10136006087	2,679.20 2,679.20	1,768.27 910.93	In Transit In Transit		912-Administration/Office 912-Administration/Office	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/7/2023	5/25/2023	B-267500747	5593-Mathnasium of Corona	5880-Instructional Vendors &	10136006100	827.00	827.00	In Transit		910-Instructional Funds	2053-Excel Academy Charter School - Warner	
	8/7/2023	6/30/2023	46108	5353-Partners in Special Education 5353-Partners in Special Education	5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven	10136006081 10136006081	747.50 747.50	260.00 487.50	In Transit In Transit		Nursing Consult Counseling Services	907-Special Education 907-Special Education	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner
	8/7/2023	6/1/2023	1903190514	5664-Infiniti Kids Corporation	5100-SpEd Consultants and Ven	10136006090	650.00	650.00	In Transit		ESY Services 22-23	907-Special Education	2053-Excel Academy Charter School - Warner
	8/7/2023	6/30/2023	26306212388	5042-ASTA-USA Translation Services, INC	5800-Professional Services -	10136006094	602.00	602.00	In Transit		Document Translation	907-Special Education	2073-Excel Academy Charter School - Helendale
	8/7/2023	7/6/2023	Jun-23	6022-Newport Beach Developmental Optometri	5100-SpEd Consultants and Ven	10136006084	600.00	600.00	In Transit		Vision Therapy/ ESY 22-23	907-Special Education	2053-Excel Academy Charter School - Warner
	8/7/2023	6/14/2023	3689	5556-Small Talk OC	5100-SpEd Consultants and Ven	10136006099	500.00	500.00	In Transit		ESY Services 22-23	907-Special Education	2053-Excel Academy Charter School - Warner
	8/7/2023	6/30/2023	10966	5162-Effectual Educational Consulting Services 5162-Effectual Educational Consulting Services	5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven	10136006102 10136006102	467.50 467.50	381.25 86.25	In Transit In Transit		AT and APE Services Assistive Tech Services 22/23	907-Special Education 907-Special Education	2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner
	8/7/2023	7/7/2023	35994	5257-Jump and Shout Therapy, Inc. 5257-Jump and Shout Therapy, Inc.	5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven	10136006092 10136006092	450.00 450.00	240.00 210.00	In Transit In Transit		ESY- Speech Services ESY Services 22-23	907-Special Education 907-Special Education	2073-Excel Academy Charter School - Helendale 2073-Excel Academy Charter School - Helendale
	8/7/2023	7/27/2023	EX2023.06	5400--Therapy in Action	5100-SpEd Consultants and Ven	10136006091	440.00	440.00	In Transit		OT Services- ESY	907-Special Education	2073-Excel Academy Charter School - Helendale
	8/7/2023	7/24/2023	3755	6119--California School Public Relations Associa 6119--California School Public Relations Associa	5300-Dues & Memberships 5300-Dues & Memberships	10136006097 10136006097	400.00 400.00	136.00 264.00	In Transit In Transit		911-Executive Administration 911-Executive Administration	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	6/30/2023	160882	v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc.	5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven	10136006098 10136006098	399.97 399.97	255.25 108.00	In Transit In Transit		PT & BIS Services Counseling Services	907-Special Education 907-Special Education	2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner
	8/7/2023	6/30/2023	160886	v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc.	5100-SpEd Consultants and Ven 5100-SpEd Consultants and Ven	10136006098 10136006098	399.97 399.97	36.72	In Transit		ESY Services 22/23	907-Special Education	2053-Excel Academy Charter School - Warner
	8/7/2023	7/1/2023	0138186-IN	5756-School Services of California, Inc. 5756-School Services of California, Inc.	5300-Dues & Memberships 5300-Dues & Memberships	10136006089 10136006089	355.00 355.00	234.30 120.70	In Transit In Transit		912-Administration/Office 912-Administration/Office	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/7/2023	7/13/2023	5120-071323	5120-County of Orange 5120-County of Orange	5860-Service Fees 5860-Service Fees	10136006080 10136006080	319.41 319.41	108.60 210.81	In Transit In Transit		909-Business Services 909-Business Services	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	7/7/2023	6406165	5411--Total Education Solutions	5100-SpEd Consultants and Ven	10136006101	275.00	275.00	In Transit		APE Services	907-Special Education	2053-Excel Academy Charter School - Warner
	8/7/2023	7/10/2023	SI-181523	1978--The Logic of English 1978--The Logic of English	4310-Materials & Supplies 4310-Materials & Supplies	10136006085 10136006085	206.68 206.68	70.27 136.41	In Transit In Transit		906-Education Services 906-Education Services	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	7/10/2023	14244	5017--Alpha Vision, Inc. 5017--Alpha Vision, Inc.	5940-Technology Services 5940-Technology Services	10136006095 10136006095	150.00 150.00	51.00 99.00	In Transit In Transit		912-Administration/Office 912-Administration/Office	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	7/24/2023	978862	5483--Discovery Science Center of Orange Cou 5483--Discovery Science Center of Orange Cou	5835-Field Trips 5835-Field Trips	10136006093 10136006093	150.00 150.00	51.00 99.00	In Transit In Transit		910-Instructional Funds 910-Instructional Funds	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	7/29/2023	00002E01V5303	1649-LPS 1649-LPS	5930-Postage 5930-Postage	10136006096 10136006096	35.17 35.17	11.23 21.81	In Transit In Transit		912-Administration/Office 912-Administration/Office	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/7/2023	7/22/2023	00002E01V5293	1649-LPS 1649-LPS	5930-Postage 5930-Postage	10136006096 10136006096	35.17 35.17	1.41 0.72	In Transit In Transit		912-Administration/Office 912-Administration/Office	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/8/2023	7/16/2023	2089-082023	5796-ERMIS - CharterLIFE 5796-ERMIS - CharterLIFE 5796-ERMIS - CharterLIFE 5796-ERMIS - CharterLIFE 5796-ERMIS - CharterLIFE 5796-ERMIS - CharterLIFE	3990-PY Benefit Adjustments 3990-PY Benefit Adjustments 3990-PY Benefit Adjustments 3990-PY Benefit Adjustments 3990-PY Benefit Adjustments 3990-PY Benefit Adjustments	20136003404 20136003404 20136003404 20136003404 20136003404 20136003404	104,726.75 104,726.75 104,726.75 104,726.75 104,726.75 104,726.75	11,998.34 57,118.46 6,180.83 1.82 3.54 29,423.76	In Transit In Transit In Transit In Transit In Transit In Transit		000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts 000-Schoolwide -Revenues/BS Accounts	2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale 2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/8/2023	6/5/2023	2308	5846-Raise the Barre 5846-Raise the Barre	5800-Professional Services - 5800-Professional Services -	20136003403 20136003403	10,800.00 10,800.00	1,224.00 2,376.00	In Transit In Transit		912-Administration/Office 912-Administration/Office	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/8/2023	6/5/2023	2309	5846-Raise the Barre 5846-Raise the Barre	5800-Professional Services - 5800-Professional Services -	20136003403 20136003403	10,800.00 10,800.00	2,448.00 4,752.00	In Transit In Transit		912-Administration/Office 912-Administration/Office	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/8/2023	7/14/2023	HW-OL-168080	6106-Owl Labs, Inc. 6106-Owl Labs, Inc.	4320-Office Supplies 4320-Office Supplies	20136003400 20136003400	930.96 930.96	316.53 614.43	In Transit In Transit		911-Executive Administration 911-Executive Administration	2073-Excel Academy Charter School - Helendale 2053-Excel Academy Charter School - Warner	
	8/8/2023	7/5/2023	4983214	1201-Rainbow Resource Center, Inc 1201-Rainbow Resource Center, Inc	4310-Materials & Supplies 4310-Materials & Supplies	20136003402 20136003402	360.90 360.90	238.19 122.71	In Transit In Transit		906-Education Services 906-Education Services	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/8/2023	7/3/2023	11AM-TPHR-1G DY	1925-Amazon Capital Services, Inc. 1925-Amazon Capital Services, Inc.	4320-Office Supplies 4320-Office Supplies	20136003401 20136003401	102.26 102.26	67.49 34.77	In Transit In Transit		912-Administration/Office 912-Administration/Office	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/14/2023	7/10/2023	140-INVS123	5368-School Pathways, LLC	5830-Non-Instructional Softwa	10136006127	17,677.93	17,677.93	In Transit		912-Administration/Office	2053-Excel Academy Charter School - Warner	
	8/14/2023	8/1/2023	613726	5812--The Princeton Review 5812--The Princeton Review	4101-Textbooks & Core Curricu 4101-Textbooks & Core Curricu	10136006106 10136006106	17,500.00 17,500.00	11,550.00 5,950.00	In Transit In Transit		906-Education Services 906-Education Services	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/14/2023	3/16/2023	1317	5620-Life & Tech USA, Inc. 5620-Life & Tech USA, Inc.	4101-Textbooks & Core Curricu 4101-Textbooks & Core Curricu	20136003405 20136003405	7,500.00 7,500.00	4,950.00 2,550.00	In Transit In Transit		906-Education Services 906-Education Services	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/14/2023	8/9/2023	6137-08142023	6137--RJ Powell Consultants, Inc. 6137--RJ Powell Consultants, Inc.	5895-Professional Development 5895-Professional Development	10136006116 10136006116	4,997.00 4,997.00	3,298.02 1,698.98	In Transit In Transit		912-Administration/Office 912-Administration/Office	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Helendale	
	8/14/2023	8/1/2023	281474	1293--Moving Beyond the Page	4100-Textbooks & Core Curricu	10136006123	1,198.46	1,198.46	In Transit		910-Instructional Funds	2053-Excel Academy Charter School - Warner	

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 14, 2023 at 10:20 AM

8/14/2023	8/7/2023	1314	1869--Mad Science Of West O.C. 1869--Mad Science Of West O.C.	5841--Community Marketing 5841--Community Marketing	10136006109 10136006109	940.00 940.00	319.60 620.40	In Transit In Transit	914--Community Engagement 914--Community Engagement	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
8/14/2023	8/1/2023 8/1/2023 8/1/2023	5010996 5010800 5010797	1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	20136000306 20136000306 20136000306	879.73 879.73 879.73	597.32 240.60 41.81	In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
8/14/2023	8/1/2023	610971832	6015--Granite Telecommunications 6015--Granite Telecommunications	5910--Telephone 5910--Telephone	10136006105 10136006105	810.90 810.90	535.19 275.71	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	7/26/2023	5121-082423	5121--Cox Business 5121--Cox Business	5910--Telephone 5910--Telephone	10136006126 10136006126	695.71 695.71	459.17 236.54	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	8/1/2023	HW76898	5567--Vector Solutions 5567--Vector Solutions	5800--Professional Services - 5800--Professional Services -	20136003407 20136003407	650.00 650.00	429.00 221.00	In Transit In Transit	906--Education Services 906--Education Services	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	9/30/2022 2/15/2023	22-03-0137 22-01-0182	3206--eDynamic Learning 3206--eDynamic Learning	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006108 10136006108	530.00 530.00	265.00 265.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	7/27/2023	23041	5780--Balloons by Jenn 5780--Balloons by Jenn	5841--Community Marketing 5841--Community Marketing	20136003408 20136003408	504.06 504.06	171.38 332.68	In Transit In Transit	914--Community Engagement 914--Community Engagement	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
8/14/2023	7/14/2023	1443	5809--Charter Connect 5809--Charter Connect	5841--Community Marketing 5841--Community Marketing	10136006119 10136006119	500.00 500.00	170.00 330.00	In Transit In Transit	913--Marketing 913--Marketing	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
8/14/2023	7/31/2023 8/1/2023 7/31/2023	7565 7587 7566	1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006113 10136006113 10136006113	428.70 428.70 428.70	39.90 117.90 270.90	In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
8/14/2023	8/1/2023	14257	5017--Alpha Vision, Inc. 5017--Alpha Vision, Inc.	5940--Technology Services 5940--Technology Services	10136006120 10136006120	379.00 379.00	250.14 128.86	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	8/1/2023	0138726-IN	5756--School Services of California, Inc. 5756--School Services of California, Inc.	5300--Dues & Memberships 5300--Dues & Memberships	10136006122 10136006122	355.00 355.00		In Transit	912--Administration/Office	2053--Excel Academy Charter School - Warner
8/14/2023	8/1/2023 8/1/2023 8/1/2023 8/1/2023 8/1/2023 8/1/2023	483491 483483 483485 483480 483493 483490 483484	2129--Studies Weekly 2129--Studies Weekly 2129--Studies Weekly 2129--Studies Weekly 2129--Studies Weekly 2129--Studies Weekly 2129--Studies Weekly	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006124 10136006124 10136006124 10136006124 10136006124 10136006124 10136006124	344.59 344.59 344.59 344.59 344.59 344.59 344.59	43.05 43.05 43.05 43.05 43.05 43.05 43.25	In Transit In Transit In Transit In Transit In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
8/14/2023	7/12/2023	130823	1598--Ocean Institute 1598--Ocean Institute	5835--Field Trips 5835--Field Trips	10136006111 10136006111	327.00 327.00	215.82 111.18	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	7/3/2023	5259	5544--Law Offices of Young, Minney & Corr, LL 5544--Law Offices of Young, Minney & Corr, LL	5810--Legal 5810--Legal	10136006112 10136006112	292.50 292.50	99.45 193.05	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
8/14/2023	7/31/2023 8/1/2023	916174 916202	5016--All About Learning Press, Inc 5016--All About Learning Press, Inc	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006125 10136006125	264.49 264.49	27.52 236.97	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
8/14/2023	8/1/2023 8/1/2023	122890 366150	3031--Essentials in Writing 3031--Essentials in Writing	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006118 10136006118	243.50 243.50	118.40 125.10	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
8/14/2023	8/2/2023 8/2/2023	5279785 5279782	1208--Singapore Math Inc 1208--Singapore Math Inc	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006114 10136006114	215.00 215.00	74.04 140.96	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
8/14/2023	8/4/2023	131	6123--Mr. Henry's Music: World LLC 6123--Mr. Henry's Music: World LLC	4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	10136006121 10136006121	167.00 167.00	110.22 56.78	In Transit In Transit	906--Education Services 906--Education Services	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	7/31/2023	15112217	5296--LEAF 5296--LEAF	5620--Equipment Leases 5620--Equipment Leases	10136006110 10136006110	143.86 143.86	94.95 48.91	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	7/28/2023 7/28/2023 8/2/2023	17512 17513 17559	1243--Jack's Publishing, LLC 1243--Jack's Publishing, LLC 1243--Jack's Publishing, LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006117 10136006117 10136006117	89.37 89.37 89.37	23.99 23.99 41.39	In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/14/2023	8/1/2023	520066	1179--Home Science Tools 1179--Home Science Tools	4310--Materials & Supplies 4310--Materials & Supplies	10136006115 10136006115	80.09 80.09		In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/14/2023	7/28/2023	072823-161	1270--Easy Grammar Systems 1270--Easy Grammar Systems	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006107 10136006107	73.85 73.85		In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/16/2023	5/30/2023	B-267500521	4185--Kumon Math and Reading - Tustin Ranch 4185--Kumon Math and Reading - Tustin Ranch	5880--Instructional Vendors & 5880--Instructional Vendors &	Voided - 10136006003 Voided - 10136006003	-345.00 -345.00		In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/28/2023	8/28/2023	5367-082823	5367--San Bernardino Superintendent Of School 5367--San Bernardino Superintendent Of School	9525--STRS 9525--STRS	30073 30073	152,139.36 152,139.36		In Transit	000--Schoolwide -Revenues/BS Accounts	2073--Excel Academy Charter School - Helendale
8/28/2023	7/31/2023 4/27/2011955 7/31/2023	4027011955 4027011734	1196--Savas Learning Company LLC 1196--Savas Learning Company LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006145 10136006145	85.73 85.73	17.39 68.34	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
8/28/2023	8/4/2023	6377	2699--Nicole The Math Lady, LLC. 2699--Nicole The Math Lady, LLC.	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006133 10136006133	79.00 79.00		In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
8/28/2023	8/3/2023	916278	5016--All About Learning Press, Inc 5016--All About Learning Press, Inc	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006138 10136006138	75.60 75.60		In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
8/28/2023	8/3/2023	3357	2467--Waldorfish 2467--Waldorfish	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006142 10136006142	59.00 59.00		In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
8/28/2023	8/16/2023	EXCL 22/23	5444--Helendale School District 5444--Helendale School District	9500--Accounts Payable 9500--Accounts Payable	10136006137 10136006137	180,531.72 180,531.72		In Transit	909--Business Services	2073--Excel Academy Charter School - Helendale
8/28/2023	8/24/2023	5488-08242023	5488--Warner Unified School District 5488--Warner Unified School District	9500--Accounts Payable 9500--Accounts Payable	10136006146 10136006146	112,658.00 112,658.00		In Transit	909--Business Services	2053--Excel Academy Charter School - Warner
8/28/2023	8/3/2023 8/3/2023 8/4/2023 8/7/2023 8/7/2023 8/4/2023 8/3/2023 8/3/2023	281798 281800 281850 281775 282033 282033 281519 281889 281818 281748	1293--Moving Beyond the Page 1293--Moving Beyond the Page 1293--Moving Beyond the Page 1293--Moving Beyond the Page 1293--Moving Beyond the Page 1293--Moving Beyond the Page 1293--Moving Beyond the Page 1293--Moving Beyond the Page 1293--Moving Beyond the Page 1293--Moving Beyond the Page	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006134 10136006134 10136006134 10136006134 10136006134 10136006134 10136006134 10136006134 10136006134 10136006134	6,042.23 6,042.23 6,042.23 6,042.23 6,042.23 6,042.23 6,042.23 6,042.23 6,042.23 6,042.23	238.21 386.11 1,126.21 658.69 238.92 1,144.21 180.14 653.36 1,136.38	In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
8/28/2023	7/27/2023	10056	6127--The Core Project 6127--The Core Project	4350--Other Supplies - Materia 4350--Other Supplies - Materia	10136006149 10136006149	4,950.00 4,950.00	3,267.00 1,683.00	In Transit In Transit	907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/28/2023	7/27/2023	HW21317	6102--Wilson Language Training Corporation 6102--Wilson Language Training Corporation	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006153 10136006153	4,884.67 4,884.67	1,660.79 3,223.88	In Transit In Transit	908--Intervention/Title I 908--Intervention/Title I	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
8/28/2023	8/1/2023 8/1/2023 8/4/2023 8/4/2023 7/31/2023 8/7/2023 8/4/2023 8/4/2023	7588 7685 7601 7591 7615 7564 7605 7600 7596	1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	10136006130 10136006130 10136006130 10136006130 10136006130 10136006130 10136006130 10136006130 10136006130	2,216.60 2,216.60 2,216.60 2,216.60 2,216.60 2,216.60 2,216.60 2,216.60 2,216.60	229.80 87.90 197.85 441.80 519.70 229.85 217.80 251.90 39.90	In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
8/28/2023	6/30/2023	EXCL01-0623	5378--Specialized Therapy Services, Inc. 5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	10136006147 10136006147	1,631.25 1,631.25		In Transit	907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale

8/4/2023	1N0N-GLNN-FMXL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	25.28	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
8/4/2023	1M9G-C31G-LJRR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	88.47	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
8/24/2023	1WQ4-1TDP-9G7H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	27.57	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
8/7/2023	1KXG-CMKL-0a3X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	21.54	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
8/3/2023	1HJH-CMDM-PATL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	109.99	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale	
8/4/2023	1YHX-LKJY-CPDR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	303.45	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
8/7/2023	13L3-94PW-NWHD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	47.36	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
		1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	24.40	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale	
8/3/2023	1VT4-D4N1-7J1Q	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	16.11	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
8/7/2023	1KRT-M43M-PHTM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	270.61	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
8/9/2023	1LCL-FVXG-WPHD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	87.25	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
7/28/2023	1LFW-FKXK-VMP6	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	26.86	In Transit	906-Education Services	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	52.14	In Transit	906-Education Services	2053-Excel Academy Charter School - Warner	
7/31/2023	10CC-F3W6-DNC9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	35.56	In Transit	912-Administration/Office	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	69.03	In Transit	912-Administration/Office	2053-Excel Academy Charter School - Warner	
8/2/2023	1YDK-3PRM-9FTF	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	46.22	In Transit	915-Technology	2053-Excel Academy Charter School - Warner	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	23.81	In Transit	915-Technology	2073-Excel Academy Charter School - Helendale	
7/29/2023	1M7H-GYQY-4DRL	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	9.16	In Transit	913-Marketing	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	17.77	In Transit	913-Marketing	2053-Excel Academy Charter School - Warner	
8/3/2023	197C-C7H1-9KF1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	13.08	In Transit	914-Community Engagement	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	25.39	In Transit	914-Community Engagement	2053-Excel Academy Charter School - Warner	
7/29/2023	1YKQ-9VXT-13VF	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	9.16	In Transit	913-Marketing	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	17.77	In Transit	913-Marketing	2053-Excel Academy Charter School - Warner	
8/10/2023	1YMW-666L-JGQ3	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	20.15	In Transit	912-Administration/Office	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	39.10	In Transit	912-Administration/Office	2053-Excel Academy Charter School - Warner	
7/26/2023	1YWK-LKJH-LKTD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	9.23	In Transit	915-Technology	2053-Excel Academy Charter School - Warner	
		1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	20136003409	3,302.30	4.76	In Transit	915-Technology	2073-Excel Academy Charter School - Helendale	
8/6/2023	1YWK-LKJH-KJHP	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	54.88	In Transit	914-Community Engagement	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	106.54	In Transit	914-Community Engagement	2053-Excel Academy Charter School - Warner	
7/27/2023	1JTN-TT4J-M47N	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	181.72	In Transit	906-Education Services	2053-Excel Academy Charter School - Warner	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	93.61	In Transit	906-Education Services	2073-Excel Academy Charter School - Helendale	
8/10/2023	1YMP-VWQ6-JTC3	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	20.15	In Transit	912-Administration/Office	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	39.10	In Transit	912-Administration/Office	2053-Excel Academy Charter School - Warner	
8/17/2023	1WFW-9F1N-RP11	1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	16.49	In Transit	912-Administration/Office	2073-Excel Academy Charter School - Helendale	
		1925-Amazon Capital Services, Inc.	4320-Office Supplies	20136003409	3,302.30	32.00	In Transit	912-Administration/Office	2053-Excel Academy Charter School - Warner	
8/29/2023	8/8/2023	5359-080823	5359-Ritney Bowes	5930-Postage	20136003413	402.50	265.65	In Transit	912-Administration/Office	2053-Excel Academy Charter School - Warner
		5359-Ritney Bowes	5930-Postage	20136003413	402.50	136.85	In Transit	912-Administration/Office	2073-Excel Academy Charter School - Helendale	
8/29/2023	8/3/2023	1113	5551-Homegrown Learners LLC	4100-Textbooks & Core Curricu	20136003410	297.00	297.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
8/29/2023	8/7/2023	1WZ2300551	1195-Peace Hill Press, Inc. dba Well Trained M	4100-Textbooks & Core Curricu	20136003416	93.90	93.90	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
8/29/2023	8/1/2023	1038663	1148-Institute for Excellence in Writing	4100-Textbooks & Core Curricu	20136003412	87.71	87.71	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
8/29/2023	7/27/2023	210695A	1167-The Critical Thinking Co.	4100-Textbooks & Core Curricu	20136003411	46.49	46.49	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale

Total for CHASE 9313

715,639.73 715,639.73

Excel Academy Charter School

AUTHORIZATION OF SIGNATURES

The Board of Directors of the Excel Academy Charter School has determined the following:

1. The Board of Directors of the Excel Academy Charter School wishes to designate certain persons employed by the Charter School to sign documents of the Charter School on its behalf.

Signature Authorization	Federal/State Documents	Contracts/Services Agreements	Authorizing District Documents	Purchase Orders	Wire/ACH Transfers	Chase Bank for Business	Personnel Documents	Payroll Documents
Heidi Gasca, CEO/Executive Director	✓	✓	✓	✓	✓	✓	✓	✓
Keri Schneeweiss, Director of Operations	✓	✓		✓	✓	✓	✓	
Joe Sorrera, Director Business Services	✓	✓	✓	✓	✓	✓	✓	✓
Megan Anderson, Assistant Director Human Resources	✓					✓	✓	✓
Nicole Tanner, Business Manager	✓	✓	✓	✓	✓			✓
Jola Wrzesien, Payroll Manager								✓

This authorization was passed and adopted on September 14, 2023.

Coversheet

Consent - Education Student/Services

Section: XI. Consent
Item: B. Consent - Education Student/Services
Purpose:
Submitted by:
Related Material: English Language Development _Handbook_for_Families_23_24-INT.pdf
Pali Field Trip Form_23_24.pdf
Washington D.C. Field Trip Form 23_24.pdf
Special Education Exhibit_B_2023-24_Individual Service Agreement.pdf
Special Education Exhibit_E_EACS_Attendance_Sheet_23-24.pdf
Special Education Master Contract-2023-24.pdf

BACKGROUND:

Item: Pali Institute Science Camp

Background: It is recommended that the Board approve the Pali Institute Overnight Science Camp Field Trip on October 22-24th, 2023, which is scheduled for students in 5th-8th grade.

This field trip is paid for entirely with the student's instructional funds.

Item: Approval of the Washington D.C. Three Night Field Trip

Background: It is recommended that the Board approve the Washington D.C. Three Night Field Trip on April 4-7, 2024, which is scheduled for students in 9th-12th grade.

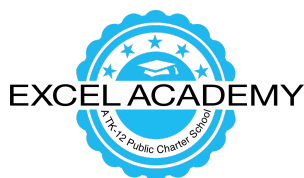
This field trip is paid for in part with the student's instructional funds.

Item: EACS English Language Development (ELD) Handbook

Background: The EACS English Learner Handbook offers families answers for frequently asked questions, explains the details of our English Learner program, and includes links to helpful resources.

Item: Approval of the Special Education Agreement for External Vendors

Background: Excel Academy Charter Schools Special Education department has improved the information in the vendor agreement, specific to special education providers regarding the cancellation policy, data reporting, progress reports from vendors, contractor substitutes, mileage reimbursement authorization, and has reduced the exhibits provided.



ELD Handbook for Families

Select the “Document Outline” image  in the upper left corner to go preview or select a specific question.

What is EL?

English Learner

What is ELD?

English Language Developer / English Language Development

Who Can I Contact?

General Questions and Support	Your Teacher of Record
Curriculum, Instruction & Support	Tamara Murphy tmurphy@excelacademy.education
Designation & ELPAC Assessments	Jenny Craig jcraig@excelacademy.education

How is a student identified?

Every family completes a home language survey as part of their enrollment process. If a family answers yes to any of the questions, schools are prompted to administer the initial ELPAC assessment.

What is a “designation”?

Students are designated as English Learners based on their results from the Initial ELPAC assessment. They will either be IFEP (initial fluent English proficient) or designated as an English Learner (EL). EL students have the opportunity to redesignate or reclassify fluent English proficient (RFEP) if they earn an overall score of 4 on their Summative ELPAC assessment. The summative assessment is only offered once annually in the spring.

What are CA requirements?

[California Department of Education Recommendation](#)

[FAQ's - California Department of Education](#)

What is the EACS English Language Development (ELD) Program?

- Synchronous, *designated* instruction through virtual classes for acquisition of linguistic and academic goals in the domains of reading, writing, speaking, and listening per California Department of Education.
- Asynchronous assignments using research based curriculum proven to meet the needs of English learners.

What are EACS EL requirements?

EL students must participate in *designated*, synchronous, virtual instruction through our ELD LIVE classes (3x weekly, 35 min. each) and asynchronous activities (2 assignments or lessons) to meet the requirement each week. All absences must be reported to the ELD teacher and/or Intervention Department in order to be excused.

Each Local Education Association (LEA) may choose their own curriculum, instruction, and program requirements. Our EACS ELD program requirements are very comparable to other schools in the state. More information may be found on the [CDE website](#).

We are unable to accept private tutoring in lieu of our ELD program because we are unable to monitor attendance, participation, and progress of the student. Private tutoring can absolutely be used to supplement our ELD program.

What are home educator/parent expectations?

- Work together to reclassify your student/s as English proficient.
- Remain consistent with ELD program attendance so your student/s get the most out of their learning experience
- Communicate with the ELD Live Teacher, Teacher of Record (ToR) or Virtual Teacher, and Intervention Department for collaborative support.

What is the PIN Process for the ELD Program?

A PIN for the ELD program may be issued for any of the following:

- Unexcused absences from ELD Live
- Incomplete/missing assignments from ELD Live
- Excessive absences from ELD Live
- Incomplete ELD online lessons

How to exit the ELD program?

The goal of language acquisition programs is for students to become proficient in English as rapidly as possible and to meet state academic achievement measures. This district’s exit (reclassification) criteria are listed below.

Exit (Reclassification) Criteria
(20 U.S.C Section 6312[e][3][A][ii])

Required Criteria (California <i>Education Code</i> [EC] Section 313[f])
English Language Proficiency Assessment Results (Summative Assessment) ELPAC score of: Overall- 4
Teacher Evaluation
Parental Opinion and Consultation
*Smarter Balanced and/or Local Assessments- optional

The Summative English Language Proficiency Assessments for California (ELPAC) are administered annually in the spring (i.e. reading, writing, listening, and speaking). Assessment results typically are communicated at the beginning of the school year. Parents/Guardians will receive their student’s score report and a letter indicating the student’s language acquisition status (EL or RFEP). Once a student is reclassified fluent English proficient (RFEP) they no longer need to participate in ELD curriculum and ELD Live classes.

What is an LTEL?

Long-term English language learners (LTEL) are *defined* as (including all)

- Students in grades 6 to 12

- Enrolled in U.S. schools for more than six years
- Remained at the same level of English for two or more years as measured by ELPAC
- Scored "standard not met" or "standard nearly met" on the CAASPP ELA assessment.

Families will be notified annually if their student has been classified as a LTEL. 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 (SST) 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 and/or in their cumulative folder. SST goals will be implemented with ToR support and monitoring. Can EL students use private tutoring?

What if my EL student has an IEP?

Families, SPED Case Managers, ToRs or virtual teachers and the Intervention Department can work together collaboratively to best support the needs of students with an Individual Education Plan (IEP).

Curriculum & Instruction

Have your EL student bring their computer to the first in-person meeting so your Teacher of Record can support you to access the resources needed for ELD curriculum and instruction.

K-3 Synchronous Instruction (ELD Live)

- Curriculum: Literacy Footprints

- Virtual (ELD Live) class and parent communication is led by ELD Teacher; INT Dept. and ToR follows up to provide support, as needed
- Tuesdays, Wednesdays, Thursdays (35 minutes per class)
- All student absences must be reported to the student's ELD Live Teacher.
- The Intervention Department will monitor student participation and progress in synchronous learning.

K-3 Asynchronous Instruction (Independent)

- Curriculum: Imagine Language & Literacy
- Activity Assignments given by ELD Teacher; INT Dept. and ToR follow up to provide support, as needed
- Student & ToR digital access will be created and provided to Families and ToRs by INT Dept.
- The Intervention Department will monitor student participation and progress in asynchronous learning.

4-12 Synchronous Instruction (ELD Live)

- Curriculum: English 3D
- Virtual (ELD Live) class and parent communication is led by ELD Teacher; INT Dept. and ToR follows up to provide support, as needed
- Tuesdays, Wednesdays, Thursdays (35 minutes per class)
- All student absences must be reported to the student's ELD Live Teacher.
- The Intervention Department will monitor student participation and progress in synchronous learning.

4-12 Asynchronous Instruction (Independent)

- Curriculum: English 3D Assignments

- Activity Assignments given by ELD Teacher; INT Dept. and ToR follows up to provide support, as needed
- Student & ToR digital access will be created and provided to Families and ToRs by INT Dept.
- The Intervention Department will monitor student participation and progress in asynchronous learning.

EL Teaching Strategies

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. ToRs and Parents should 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
- Lots of 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

ELD Standards

Please click on the link to view ELD standards by grade level on the *California Department of Education* website. [ELD K-12 Standards](#)

[EACS EL Master Plan](#)

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

Resources

[Online Resource Links](#)

Khan Academy has videos for Learning [Support](#).

Translation & Interpretation

We recommend [DeepL](#) for translation.

It's recommended to have your EL students bring their computer to the first in person meeting to ensure they are able to access the resources needed for language support.

Please let your Teacher of Record know if you wish to have communication sent in your primary language or would like to request an interpreter for virtual/in-person meetings.

How can I get involved in EACS decisions for English Learners?

Join the English Learner Advisory Committee (ELAC). This is a committee for parents or other community members who want to advocate for English Learners. School Information and opportunities for English Learner support and participation are shared during the meeting. Information to join these meetings will be shared through school communications. Further information can be found on our [website](#). Please contact tmurphy@excelacademy.education with any questions.

Education Services

OVERNIGHT FIELD TRIP REQUEST FORM for BOARD APPROVAL

This form is to be used to obtain board approval for overnight field trips.

1. Overnight field trip requests must be submitted on this form for consideration.
2. Overnight field trips require approval from the charter school board
3. The field trip request form must be signed by the field trip coordinator and the charter school executive director/director/ or designee before sending to the board for approval.
4. A trip itinerary must be attached to the completed request form.

Date of Request	
Name of Charter School	Excel Academy Charter Schools
Lead Chaperone	Melissa Harvilla
Field Trip Coordinator	Melissa Harvilla
Director/Executive Director/Designee Location of Trip	<u>Pali Institute: Outdoor Education Center</u>
Dates of Trip Classes/Grade Level(s)	5th-8th
Instructional Objectives	<ol style="list-style-type: none"> 1. Students will analyze and interpret data they have collected from an owl pellet dissection and determine food source and other environmental factors from evidence. 2. Students will explore the principles of aerodynamics and test their engineering skills while designing bottle

3. Students will learn basic outdoor skills and work as a team to problem solve during an outdoor survival simulation.
4. Students will demonstrate knowledge of design solutions, business marketing, and product testing through a “balloon drop” workshop.

Standards Addressed

NGSS MS-ETS1-3. Analyze data from tests to determine similarities and differences among several design solutions to identify the best characteristics of each that can be combined into a new solution to better meet the criteria for success.

3-5ETS1-1. Define a simple design problem reflecting a need or want that includes specific criteria for success and constraints on materials, time, or cost.

3-5ETS1-2. Generate and compare multiple possible solutions to a problem based on how well each is likely to meet the criteria and constraints on the problem.

CCSS ELA-Literacy.RST-608.3. Follow precisely a multistep procedure when carrying out experiments, taking measurements, or performing technical tasks.

NGSS 3-5ETS1-3. Plan and carry out fair tests in which variables are controlled and failure points are considered to identify aspects of a model or prototype that can be improved.

NGSS 5-PS2-1. Support an argument that the gravitational force exerted by Earth on objects is directed down.

NGSS MS-PS2-2. Plan an investigation to provide evidence that the change in an object’s motion depends on the sum of the forces on the object and the mass of the object.

NGSS MS-PS2-4. Construct and present arguments using evidence to support the claim that gravitational interactions are attractive and depend on the masses of interacting objects.

Additional Information (if applicable)

Friday
 11am check in
 3 sessions

Saturday
 5 sessions

Sunday
 1 session
 11am departure

Fees and payment

\$390 per student

Schedule

Payment due in full by September 15

Transportation

Phone Tree/Chaperone
Groups

Signatures

Lead Chaperone Date: 9/5/2023

Field Trip Coordinator Date: 9/5/2023

Education Services

OVERNIGHT FIELD TRIP REQUEST FORM for BOARD APPROVAL

This form is to be used to obtain board approval for overnight field trips.

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2. Overnight field trips require approval from the charter school board
3. The field trip request form must be signed by the field trip coordinator and the charter school executive director/director/ or designee before sending to the board for approval.
4. A trip itinerary must be attached to the completed request form.

Date of Request	9/6/2023
Name of Charter School	Excel Academy Charter Schools
Lead Chaperone	Melissa Harvilla
Field Trip Coordinator	Melissa Harvilla
Director/Executive Director/Designee	
Location of Trip	Washington, D.C.
Dates of Trip	April 4-7, 2024
Classes/Grade Level(s)	Grades 9-12
Instructional Objectives	<ol style="list-style-type: none"> 1. Students will study our country's history, including significant historical figures and events, in an immersive setting. 2. Students will explore natural history, the history of innovation and transportation, and more at the Smithsonian Museums.

	<ol style="list-style-type: none"> 3. Students will grow in understanding of how our branches of government work. 4. Students will learn about how politics, world events, industrialism, and historical figures have shaped the United States into what it is today.
<p>Standards Addressed</p>	<p>HSS-10.1.3. Consider the influence of the U.S. Constitution on political systems in the contemporary world.</p> <p>HSS-10.2.3. Understand the unique character of the American Revolution, its spread to other parts of the world, and its continuing significance to other nations.</p> <p>HSS-10.8.5. Analyze the Nazi policy of pursuing racial purity, especially against the European Jews; its transformation into the Final Solution; and the Holocaust that resulted in the murder of six million Jewish civilians.</p> <p>HSS-11.1. Students analyze the significant events in the founding of the nation and its attempts to realize the philosophy of government described in the Declaration of Independence.</p> <p>HSS-11.1.2. Analyze the ideological origins of the American Revolution, the Founding Fathers’ philosophy of divinely bestowed unalienable natural rights, the debates on the drafting and ratification of the Constitution, and the addition of the Bill of Rights.</p> <p>HSS-11.1.4. Examine the effects of the Civil War and Reconstruction and of the industrial revolution, including demographic shifts and the emergence in the late nineteenth century of the United States as a world power.</p> <p>HSS-11.1-4. Examine the roles of civil rights advocates (e.g., A. Philip Randolph, Martin Luther King, Jr., Malcom X, Thurgood Marshall, James Farmer, Rosa Parks), including the significance of Martin Luther King, Jr.’s “Letter from Birmingham Jail” and “I Have a Dream” speech.</p> <p>HSS-11.4. Students trace the rise of the United States to its role as a world power in the twentieth century.</p> <p>HSS-11.5.7. Discuss the rise of mass production techniques, the growth of cities, the impact of new technologies (e.g., the automobile, electricity), and the resulting prosperity and effect on the American landscape.</p> <p>HSS-PoAD.12.1. Students explain the fundamental principles and moral values of American democracy as expressed in the U.S. Constitution and other essential documents of American democracy.</p> <p>HSS-PoAD.12.4. Students analyze the unique roles and responsibilities of the three branches of government as established by the U.S. Constitution.</p>

<p>Additional Information (if applicable)</p>	
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<p>Fees and payment Schedule</p>	<p>\$2,299 per person Monthly payments beginning at the time of registration</p>
<p>Transportation</p> <p>Phone Tree/Chaperone Groups</p> <p style="text-align: center;">Signatures</p> <p>Lead Chaperone Date: 9/6/2023</p> <p>Field Trip Coordinator Date: 9/6/2023</p>	



Exhibit B: Individual Service Agreement (ISA)

Nonpublic School/Agency: _____

Local Education Agency: _____

Case Manager: _____

Pupil's Name: _____

Sex: M F Birthdate: _____ Grade: _____ Primary Disability: _____

Residential Setting: HOME FOSTER LCI Parent/Guardian's Name: _____

Pupil's Address: _____ Parent Phone & Email: _____

All terms and conditions of the current Sonoma County Special Education Local Planning Area Master Contract for Nonpublic, Nonsectarian School/Agency Service (NPS/NPA), hereinafter referred to as the "Contract," are incorporated herein by this reference. Contractor will implement the pupil's Individualized Education Program (IEP) in accordance with this Individual Service Agreement (ISA) and the Contract. Invoices shall be submitted based on actual service provided and attendance standards in the Contract.

Nonpublic Agency Services and/or Designated Instruction & Related Services Estimate:

SERVICE	SERVICE DATE RANGE	MASTER CONTRACT RATE	DURATION - MINUTES PER SESSION	FREQUENCY Times per Week or Month	WEEK MONTH OR YEAR	ESTIMATED ISA SERVICE SESSIONS	or	HOURS PER YEAR	ESTIMATED TOTAL = Cost per hour x estimated service hours or sessions
1.									\$0.00
2.									\$0.00
3.									\$0.00
4.									\$0.00
5.									\$0.00
6.									\$0.00
7.									\$0.00
8.									\$0.00
9.									\$0.00
10.									\$0.00
11.									\$0.00
12.									\$0.00
13.									\$0.00
14.									\$0.00
Maximum NPA Services and/or Designated Instruction & Related Services Cost - Estimate									\$0.00

C. Individual Pupil Specifications: _____

Progress Reporting Requirements:

The parties hereto agree to comply with the terms of the Master Contract & hereby execute this ISA by and through their duly authorized agents or representatives.

Nonpublic Agency:

Local Educational Agency:

(Authorized Signature) (Date)

(Authorized Signature) (Date)

Phone: Fax

Phone: Fax



ATTENDANCE 23-34

School: Excel Academy **Month/Year**

Authorized Weekly Time: 3

Provider: _____ **STUDENT NAME:** _____

Date	Start Time	End Time	Service	Session Type	Session Delivery	Session Delivery	Session Focus	Signature

SONOMA CHARTER SELPA

NONPUBLIC, NONSECTARIAN SCHOOL/AGENCY SERVICES MASTER CONTRACT

2023-2024

**MASTER CONTRACT
GENERAL AGREEMENT FOR NONSECTARIAN,
NONPUBLIC SCHOOL AND AGENCY SERVICES**

LEA:

Contract Year: 2023-2024

Nonpublic School:

Nonpublic Agency:

Type of Contract:

Master Contract for the fiscal year with Individual Service Agreements (ISA) to be approved throughout the term of this contract.

Individual Master Contract for a specific student incorporating the Individual Service Agreement (ISA) into the terms of this Individual Master Contract specific to a single student.

Interim Contract: an extension of the previous fiscal years approved contracts and rates. The sole purpose of this Interim Contract is to provide for ongoing funding at the prior year's rates for 90 days at the sole discretion of the LEA. Expiration Date: date

When this section is included as part of any Master Contract, the changes specified above shall amend Section 4 – Term of Master Contract.

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Description of EXHIBITS

EXHIBIT A – Rate Schedule (26.Data Reporting, 64. Execution of Contract)

Instructions to LEA for Completing the ISA

EXHIBIT B – Individual Service Agreement Form ISA (26. Data Reporting, 6. Independent Service Agreement)

EXHIBIT C – Staff List - Statement of Certifications, Credentials, Licenses, and Clearances (26.Data Reporting, 47.Verification of Licenses, Credentials and Other Documents)

~~**EXHIBIT D** – SCOE Exit Form (9.Maintenance of Records, 26. Data Reporting)~~

~~**EXHIBIT E** – Daily Attendance Record – EACS (Attendance Sheet)~~

~~**EXHIBIT F** – Related Service Record – K-12 (26.Data Reporting)~~

~~**EXHIBIT G** – Attendance Register – Preschool (26.Data Reporting)~~

~~**EXHIBIT H** – removed~~

~~**EXHIBIT I** – LEA Addresses for Notices and Invoices~~

~~**EXHIBIT J** – Invoice Form (26.Data Reporting)~~

~~**EXHIBIT K** – School Calendar (25.Calendars, 26. Data Reporting)~~

~~**EXHIBIT L** – Behavioral Emergency Intervention Report SELPA/Hughes Bill, Form #7a (26 Data Reporting, 30. Positive Behavior Interventions and Supports) *Use of Behavior Emergency Intervention Report – Exhibit L~~

~~**EXHIBIT M** – SELPA Suspension & Expulsion Data Collection Form (26. Data Reporting Section 31.Student Discipline)~~

~~**EXHIBIT N** – Confirmation of completion of graduation requirements (26. Data Reporting, 37.Transcripts)~~

~~**EXHIBIT O** – Functional Analysis Assessment Report (26.Data Reporting, 30.Positive Behavior Interventions and Supports)~~

~~**EXHIBIT P** – Procedures for NPS students relocating to other districts (26. Data Reporting, 38.Student Change of Residence)~~

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~~**EXHIBIT R** – Subcontracting– Obtaining SELPA approval prior to subcontracting agreement.~~

2023-2024**Local Education Agency:****NONPUBLIC SCHOOL/AGENCY/RELATED SERVICES PROVIDER:**

NONPUBLIC, NONSECTARIAN SCHOOL/AGENCY SERVICES
MASTER CONTRACT

AUTHORIZATION FOR MASTER CONTRACT AND GENERAL PROVISIONS**1. MASTER CONTRACT**

This Master Contract (or “*Contract*”) is entered into on, **August 1, 2023**, between **Insert LEA**, and **Name of NPS/A**. (nonpublic, nonsectarian school or agency), hereinafter referred to as NPS/A or “CONTRACTOR” for the purpose of providing special education and/or related services to students with exceptional needs under the authorization of California Education Code sections 56157, 56361 and 56365 et seq. and Title 5 of the California Code of Regulations section 3000 et seq., AB490 (Chapter 862, Statutes of 2003) and AB1858 (Chapter 914, Statutes of 2004). It is understood that this agreement does not commit the LEA to pay for special education and/or related services provided to any student, or CONTRACTOR to provide such special education and/or related services, unless and until an authorized LEA representative approves the provision of special education and/or related services by CONTRACTOR.

Upon acceptance of a student, LEA shall submit to CONTRACTOR an Individual Service Agreement (hereinafter referred to as “ISA”) and a Nonpublic Services student Enrollment form as specified in the LEA Procedures. Unless otherwise agreed in writing, these forms shall acknowledge CONTRACTOR’s obligation to provide all relevant services specified in the student’s Individualized Education Program (hereinafter referred to as “IEP”). The ISA shall be executed within fifteen (15) days of a student’s enrollment. LEA and CONTRACTOR shall enter into an ISA for each student served by CONTRACTOR. As available and appropriate, the LEA shall make available access to any electronic IEP system and/or electronic database for the development of the ISA and invoices.

Unless placement and/or services is made pursuant to an Office of Administrative Hearings (hereinafter referred to as “OAH”) order, a lawfully executed settlement agreement between LEA and parent or authorized by LEA for a transfer student pursuant to California Education Code section 56325, LEA is not responsible for the costs associated with NPS placement or NPS/A services until the date on which an IEP team meeting is convened, the IEP team determines that a NPS placement is appropriate, and the IEP is signed by the student’s parent.

Disagreements between LEA and CONTRACTOR concerning the meaning, requirements, or performance of this Contract shall first be brought to the attention of the other party in writing, pursuant to the notice provision of this Contract, in an attempt to resolve the dispute at the lowest level. Education Code § 56366, subdivision (c), shall govern the resolution of fee disputes for pupils enrolled in a NPS or NPA prior to execution of the Master Contract or ISA. For up to ninety (90) days the LEA is permitted to issue a warrant based upon an attendance report at the previously agreed upon per diem rate. If the Master Contract or ISA has not been

finalized within sixty (60) days, “either party may appeal” to the State Superintendent of Public Instruction pursuant to the provisions of the California Education Code § 56366(b).

In addition to any other remedies available by law or under this Contract, SELPA and SELPA Member Districts may withhold further payment if CONTRACTOR fails to timely submit supporting documents (e.g., EXHIBITS C, H, NPS/A certification, proof of insurance and related endorsements, and subcontractor and subcontractor’s proof of insurance) required under this Contract.

If any legal action or proceeding arising out of or relating to this Contract is brought by either party to this Contract, the prevailing party shall be entitled to receive from the other party, in addition to any other relief that may be granted, reasonable attorneys’ fees, costs, and expenses incurred in the action or proceeding by the prevailing party.

2. CERTIFICATION AND LICENSES

CONTRACTOR shall be certified by the California Department of Education (hereinafter referred to as “CDE”) as a NPS/A. All NPS/A services shall be provided consistent with the area of certification and licensure specified by CDE Certification and as defined in California Education Code, section 56366 et seq and within the professional scope of practice of each provider’s license, certification, and/or credential. A current copy of CONTRACTOR’s NPS/A certification or a waiver of such certification issued by the CDE pursuant to Education Code section 56366.2 must be provided to LEA on or before the date this Agreement is executed by CONTRACTOR. This Master Contract shall be null and void if such certification or waiver is expired, revoked, rescinded, or otherwise nullified during the effective period of this Master Contract. Total student enrollment shall be limited to capacity as stated on CDE certification, and in Section 24 of the Master Contract.

In addition to meeting the certification requirements of the State of California, a CONTRACTOR that operates a program outside of this State shall be certified and all staff persons providing services to pupils shall be certified and/or licensed by that state to provide, respectively, special education and related services and designated instruction and related services to pupils under the federal Individuals with Disabilities Education Act (20 U.S.C. Sec. 1400 et seq.).

If CONTRACTOR is a licensed children’s institution (hereinafter referred to as “LCI”), CONTRACTOR shall be licensed by the state, or other public agency having delegated authority by contract with the state to license, to provide nonmedical care room and board to children, including, but not limited to, individuals with exceptional needs. The LCI must also comply with all licensing requirements relevant to the protection of the child, and have a special permit, if necessary, to meet the needs of each child so placed. If the CONTRACTOR operates a program outside of this State, CONTRACTOR must obtain all required licenses from the appropriate licensing agency in both California and in the state where the LCI is located.

With respect to CONTRACTOR’s certification, failure to notify the LEA and CDE in writing of any changes in: (1) credentialed/licensed staff; (2) ownership; (3) management and/or control of the agency; (4) major modification or relocation of facilities; or (5) significant modification of the program may result in the suspension or revocation of CDE certification and/or suspension or termination of this Master Contract by the LEA.

3. COMPLIANCE WITH LAWS, STATUTES, REGULATIONS

During the term of this Master Contract unless otherwise agreed, CONTRACTOR shall comply with all applicable federal, state, and local statutes, laws, ordinances, rules, policies and regulations. CONTRACTOR

shall also comply with all applicable LEA policies and procedures unless, taking into consideration all of the surrounding facts and circumstances, a policy or policies or a portion of a policy does not reasonably apply to CONTRACTOR. CONTRACTOR hereby acknowledges and agrees that it accepts all risks and responsibilities for its failure to comply with LEA policies and shall indemnify LEA under the provisions of Section 16 of this Agreement for all liability, loss, damage and expense (including reasonable attorneys' fees) resulting from or arising out of CONTRACTOR's failure to comply with applicable LEA policies (e.g., those policies relating to, the provision of special education and/or related services, facilities for individuals with exceptional needs, student enrollment and transfer, student inactive status, corporal punishment, student discipline, and positive behavior interventions).

CONTRACTOR acknowledges and understands that LEA may report to the CDE any violations of the provisions of this Master Contract; and that this may result in the suspension and/or revocation of CDE nonpublic school/agency certification pursuant to California Education Code section 56366.4(a).

4. TERM OF MASTER CONTRACT

The term of this Master Contract shall be from **August 1, 2023 to June, 30th 2024**~~July 31, 2024~~ (Title 5 California Code of Regulations section 3062(a)) unless otherwise stated. Neither the CONTRACTOR nor the LEA is required to renew this Master Contract in subsequent contract years. The parties acknowledge that any subsequent Master Contract is to be re-negotiated prior to July 31, 2024. In the event the contract negotiations are not agreed to by July 31, 2024, the most recently executed Master Contract will remain in effect for 90 days. (Title 5 California Code of Regulations section 3062(d)) No Master Contract will be offered unless and until all of the contracting requirements have been satisfied. The offer of a Master Contract to a CONTRACTOR is at the sole discretion of the LEA.

The provisions of this Master Contract apply to CONTRACTOR and any of its employees or independent contractors. Notice of any change in CONTRACTOR's ownership or authorized representative shall be provided in writing to LEA within thirty (30) calendar days of change of ownership or change of authorized representative.

5. INTEGRATION/CONTINUANCE OF CONTRACT FOLLOWING EXPIRATION OR TERMINATION

This Master Contract includes each ISA and they are incorporated herein by this reference. This Master Contract supersedes any prior or contemporaneous written or oral understanding or agreement. This Master Contract may be amended only by written amendment executed by both parties.

CONTRACTOR shall provide the LEA with information as requested in writing to secure a Master Contract or a renewal.

At a minimum, such information shall include copies of current teacher credentials and clearance, insurance documentation and CDE certification. The LEA may require additional information as applicable. If the application packet is not completed and returned to District, no Master Contract will be issued. If CONTRACTOR does not return the Master Contract to LEA duly signed by an authorized representative within ninety (90) calendar days of issuance by LEA, the new contract rates will not take effect until the newly executed Master Contract is received by LEA and will not be retroactive to the first day of the new Master Contract's effective date. If CONTRACTOR fails to execute the new Master Contract within such ninety-day period, all payments shall cease until such time as the new Master Contract for the current school year is signed and returned to LEA by CONTRACTOR. (California Education Code section 56366(c)(1) and (2)). In the event that this Master Contract expires or terminates, CONTRACTOR shall continue to be bound to all of the terms and conditions of the most recent executed Master Contract between CONTRACTOR and LEA for

so long as CONTRACTOR is servicing authorized students at the discretion of the LEA.

6. INDIVIDUAL SERVICE AGREEMENT; EXHIBIT B (“ISA”)

This Agreement shall include an ISA developed for each student to whom CONTRACTOR is to provide special education and/or related services. An ISA shall only be issued for students enrolled with the approval of the LEA pursuant to Education Code section 56366 (a)(2)(A). An ISA may be effective for more than one contract year provided that there is a concurrent Master Contract in effect. In the event that this Master Contract expires or terminates, CONTRACTOR, shall continue to be bound to all of the terms and conditions of the most recent executed ISAs between CONTRACTOR and LEA for so long as CONTRACTOR is servicing authorized students. ~~LEA shall provide to CONTRACTOR an ISA within 15 days of an executed IEP for services, except as provided in EXHIBIT P, which requires the LEA to develop an ISA for services within 5 days.~~

Any written agreement between the parent and LEA which alters the current individual service agreement (ISA) that outlines each pupil’s educational instruction or services provided by the CONTRACTOR shall be mutually agreed by the NPS/A and the LEA. A new ISA shall be negotiated and developed to reflect changes for the provision of services for which the CONTRACTOR is responsible resulting from a written agreement between the parent and the LEA.

Unless otherwise provided in this Master Contract, the CONTRACTOR shall provide all services specified in the IEP unless the CONTRACTOR and the LEA agree otherwise in the ISA. (California Education Code sections 56366(a) (5) and 3062(e)). In the event the CONTRACTOR is unable to provide a specific service at any time during the life of the ISA, the CONTRACTOR shall notify the LEA in writing within ten (10) business days of the last date a service was provided. CONTRACTOR shall provide any subsequent compensatory service hours agreed upon in a current ISA but not provided to a student as a result of CONTRACTOR’s lack of provision of services, excluding service hours missed due to properly documented student absence or student refusal of services. When missed services are made up, CONTRACTOR shall submit a properly prepared invoice to LEA to bill for the provision of those services for which the LEA withheld prorated payment. LEA shall compensate CONTRACTOR for approved compensatory service hours at the rates specified by the current contract, unless bill for previously and in accordance with the provision in Section 56.

If DIS is not so provided due to the absence of CONTRACTOR’S Personnel, make up sessions shall be provided within forty-five (45) days of the missed session. If CONTRACTOR does not provide all make-up services within forty-five (45) days of the missed session(s), by the fiftieth (50) day, CONTRACTOR must submit a schedule, to provide the make-up services on or before the 60th day of the missed sessions(s), or as otherwise agreed to in writing by LEA. Make up services shall occur on, or before the last school day of the year, whichever is earlier. ~~Parent or student cancellations and no-shows will be considered a student absence. CONTRACTOR shall not reschedule missed, canceled or no-show sessions due to a student absence.~~

If a parent or LEA contests the termination of an ISA by initiating a due process proceeding with the OAH, CONTRACTOR shall abide by the “stay-put” requirement of state and federal law unless the parent agrees otherwise or an Interim Alternative Educational Setting is deemed lawful and appropriate by LEA or OAH consistent with Section 1415 (k)(1)(7) of Title 20 of the United States Code. CONTRACTOR shall adhere to all LEA requirements concerning changes in placement.

Disagreements between LEA and CONTRACTOR concerning the formulation of an ISA or the Master Contract may be appealed to the County Superintendent of Schools of the County where the LEA is located, or the State Superintendent of Public Instruction pursuant to the provisions of California Education Code section 56366(c) (2).

7. DEFINITIONS

The following definitions shall apply for purposes of this contract:

- a. The term “CONTRACTOR” means a nonpublic, nonsectarian school/agency certified by the California Department of Education and its officers, agents, and employees.
- b. The term “authorized LEA representative” means a LEA administrator designated to be responsible for NPS/A. It is understood, a representative of the Special Education Local Plan Area (SELPA) of which the LEA is a member is an authorized LEA representative in collaboration with the LEA. The LEA maintains sole responsibility for this Contract, unless otherwise specified in this Contract. **SELPA Member LEA’s** (B. Roberto Cruz Leadership Academy, Bay View Academy, Big Sur Charter, California Pacific Charter - San Diego, California Pacific Charter – Sonoma, California Pacific Charter - Los Angeles, Charter School of Morgan Hill, Excel Academy Charter, Excel Academy Charter (East), Griffin Academy High, Hayward Twin Oaks Montessori, Latino College Preparatory Academy, Learning For Life Charter, Luis Valdez Leadership Academy, Mare Island Technology Academy, MIT Academy, MIT Griffin Academy Middle, Monterey Bay Charter, Motivated Youth Academy, Oakland Unity High, Oakland Unity Middle, Oasis Charter Public, Pathways Academy Charter-Adult Education, Sage Oak Charter, Sage Oak Charter School – Keppel, Sage Oak Charter School – South, Sky Mountain Charter, South Sutter Charter, The Academy Of Alameda, Voices College Bound Language Academy at Stockton, Voices College-Bound Language Academy, Voices College-Bound Language Academy at Morgan Hill, Voices College-Bound Language Academy at Mt. Pleasant, Voices College-Bound Language Academy at West Contra Costa County)
- c. The term “credential” means a valid credential, life diploma, permit, or document in special education or pupil personnel services issued by, or under the jurisdiction of, the State Board of Education if issued prior to 1970 or the California Commission on Teacher Credentialing, which entitles the holder thereof to perform services for which certification qualifications are required as defined in Title 5 of the California Code of Regulations section 3001(g).
- d. The term “qualified” means that a person holds a certificate, permit or other document equivalent to that which staff in a public school are required to hold to provide special education and related services and has met federal and state certification, licensing, registration, or other comparable requirements which apply to the area in which the individual is providing special education or related services, including those requirements set forth in Title 34 of the Code of Federal Regulations sections 200.56 and 200.58, and those requirements set forth in Title 5 of the California Code of Regulations Sections 3064 and 3065, and adheres to the standards of professional practice established in federal and state law or regulation, including the standards contained in the California Business and Professions Code.
Nothing in this definition shall be construed as restricting the activities in services of a graduate needing direct hours leading to licensure, or of a student teacher or intern leading to a graduate degree at an accredited or approved college or university, as authorized by state laws or regulations. (Title 5 of the California Code of Regulations Section 3001 (r)).
- e. The term “license” means a valid non-expired document issued by a licensing agency within the Department of Consumer Affairs or other state licensing office authorized to grant licenses and authorizing the bearer of the document to provide certain professional services or refer to themselves using a specified professional title including but not limited to mental health and board and care services at a residential placement. If a license is not available through an appropriate state licensing agency, a certificate of registration with the appropriate professional organization at the national or state level which has standards established for the certificate that are equivalent to a license shall be deemed to be a license as defined in Title 5 of the California Code of Regulations section 3001(l).

f. “Parent” means:

- i. a biological or adoptive parent; unless the biological or adoptive parent does not have legal authority to make educational decisions for the child,
- ii. a guardian generally authorized to act as the child’s parent or authorized to make educational decisions for the child,
- iii. an individual acting in the place of a biological or adoptive parent, including a grandparent, stepparent, or other relative with whom the child lives, or an individual who is legally responsible for the child’s welfare,
- iv. a surrogate parent,
- v. a foster parent if the authority of the biological or adoptive parent to make educational decisions on the child’s behalf has been specifically limited by court order in accordance with Code of Federal Regulations 300.30(b)(1) or (2).

Parent does not include the state or any political subdivision of government or the NPS/A under contract with the LEA for the provision of special education or designated instruction and services for a child. (California Education Code section 56028).

g. The term “days” means calendar days unless otherwise specified.

h. The phrase “billable day” means a school day in which instructional minutes meet or exceed those in comparable LEA programs.

i. The phrase “billable day of attendance” means a school day as defined in California Education Code Section 46307, in which a student is in attendance and in which instructional minutes meet or exceed those in comparable LEA programs unless otherwise stipulated in an IEP or ISA.

j. It is understood that the term “Master Contract” also means “Contract” and is referred to as such in this document.

ADMINISTRATION OF CONTRACT

8. NOTICES

All notices provided for by this Contract shall be in writing. Notices shall be emailed via secure server, mailed or delivered by hand and shall be effective as of the date of receipt by addressee.

All notices mailed to LEA shall be addressed to the person and address as indicated on the signature page of this Master Contract. Notices to CONTRACTOR shall be addressed as indicated on signature page of this Master Contract.

9. MAINTENANCE OF RECORDS; EXHIBIT D

All records shall be maintained by CONTRACTOR as required by state and federal laws and regulations. Notwithstanding the foregoing sentence, CONTRACTOR shall maintain all records for at least five (5) years after the termination of this Master Contract. For purposes of this Master Contract, “records” shall include, but

not be limited to student records as defined by California Education Code section 49061(b) including electronically stored information; cost data records as set forth in Title 5 of the California Code of Regulations section 3061; registers and roll books of teachers and/or daily service providers; daily service logs and notes and other documents used to record the provision of related services including supervision; daily service logs and notes used to record the provision of services provided through additional instructional assistants, NPA behavior intervention aides, and bus aides; behavior emergency reports (BER); incident reports; notification of injuries; absence verification records (parent/doctor notes, telephone logs, and related documents) if the CONTRACTOR is funded for excused absences, however, such records are not required if positive attendance is required; bus rosters; staff lists specifying credentials held and documents evidencing other staff qualifications, social security numbers, dates of hire, and dates of termination; records of employee training and certification, staff time sheets; non-paid staff and volunteer sign-in sheets; transportation and other related services subcontracts; school calendars; bell/class schedules when applicable; liability and worker's compensation insurance policies; state NPS/A certifications by-laws; lists of current board of directors/trustees, if incorporated; statement of income and expenses; general journals; cash receipts and disbursement books; general ledgers and supporting documents; documents evidencing financial expenditures; federal/state payroll quarterly reports; evidence of electronic payments; and bank statements and canceled checks or facsimile thereof.

CONTRACTOR shall maintain student records in a secure location to ensure confidentiality and prevent unauthorized access. CONTRACTOR shall maintain a current list of the names and positions of CONTRACTOR's employees who have access to confidential records. CONTRACTOR shall maintain an access log for each student's record which lists all persons, agencies, or organizations requesting or receiving information from the record. Such log shall be maintained as required by California Education Code section 49064 and include the name, title, agency/organization affiliation, date/time of access for each individual requesting or receiving information from the student's record, and a description of the record(s) provided. Such log needs to record access to the student's records by: (a) the student's parent; (b) an individual to whom written consent has been executed by the student's parent; or (c) employees of LEA or CONTRACTOR having a legitimate educational interest in requesting or receiving information from the record. CONTRACTOR/LEA shall maintain copies of any written parental concerns granting access to student records. For purposes of this paragraph, "employees of LEA or CONTRACTOR" do not include subcontractors. CONTRACTOR shall grant the following access to student records, (a) the student's parent; (b) employees of LEA or CONTRACTOR having a legitimate educational interest in requesting or receiving information from the record, and comply with parents' requests for copies of student records, as required by state and federal laws and regulations. CONTRACTOR agrees, in the event of school or agency closure, to forward student records within ten (10) business days to LEA. These shall include, but not limited to, current transcripts, IEP/IFSPs, BER's, incident reports, notification of injuries and all other relevant reports. LEA and/or SELPA shall have access to and receive copies of any and all records upon request within five (5) business days. Within ten (10) days of a pupil's transfer out of CONTRACTOR's school or agency, CONTRACTOR shall forward all pupil records to the pupil's district of residence or new NPS, as the case may be; for SCOE students, CONTRACTOR shall also send to SCOE Special Education NPS Program, students' final transcript and SCOE "Exit Form" (EXHIBIT D) within (5) days.

10. SEVERABILITY CLAUSE

If any provision of this agreement is held, in whole or in part, to be unenforceable for any reason, the remainder of that provision and of the entire agreement shall be severable and remain in effect.

11. SUCCESSORS IN INTEREST

This contract binds CONTRACTOR's successors and assignees. CONTRACTOR shall notify the LEA of any

change of ownership or corporate control.

12. VENUE AND GOVERNING LAW

The laws of the State of California shall govern the terms and conditions of this contract with venue in the County where the LEA is located.

13. MODIFICATIONS AND AMENDMENTS REQUIRED TO CONFORM TO LEGAL AND ADMINISTRATIVE GUIDELINES

This Master Contract may be modified or amended by the LEA to conform to administrative and statutory guidelines issued by any state, federal or local governmental agency. The party seeking such modification shall provide the LEA and/or CONTRACTOR thirty (30) days' notice of any such changes or modifications made to conform to administrative or statutory guidelines and a copy of the statute or regulation upon which the modification or changes are based. Both parties shall meet to negotiate any amendments or modifications to the Master Contract if the LEA proposed amendment or modification would reasonably result in increased operational expense for the CONTRACTOR.

14. TERMINATION

This Master Contract or ISA may be terminated for cause. The cause shall not be the availability of a public class initiated during the period of the contract unless the parent agrees to the transfer of the student to the public school program at an IEP team meeting. To terminate the contract either party shall give twenty (20) days prior written notice (California Education Code section 56366(a)(4)). At the time of termination, CONTRACTOR shall provide to LEA any and all documents CONTRACTOR is required to maintain under this Master Contract. ISAs are void upon termination of this Master Contract, as provided in Section 5 or 6. CONTRACTOR or LEA may terminate an ISA for cause. To terminate the ISA, either party shall give twenty (20) days prior written notice.

15. INSURANCE

CONTRACTOR shall, CONTRACTOR'S sole cost and expense, maintain in full force and effect, during the term of this Contract, the following insurance coverage from a California licensed and/or admitted insurer with an A minus (A-), VII, or better rating from A.M. Best, sufficient to cover any claims, damages, liabilities, costs and expenses (including counsel fees) arising out of or in connection with CONTRACTOR's fulfillment of any of its obligations under this Agreement or either party's use of the work or any component or part thereof:

PART I- INSURANCE REQUIREMENTS FOR NONPUBLIC SCHOOLS AND AGENCIES

- A. **Commercial General Liability Insurance**, including both bodily injury and property damage, with limits as follows:

\$1,000,000 per occurrence \$ 500,000 fire damage \$ 5,000 medical expenses \$1,000,000 personal & adv. Injury \$2,000,000 general aggregate \$2,000,000 products/completed operations aggregate.

The policy may not contain an exclusion for coverage of claims arising from claims for sexual molestation or abuse. In the event that CONTRACTOR's policy should have an exclusion for sexual molestation or abuse claims, then CONTRACTOR shall be required to procure a supplemental policy providing such coverage.

- B. **Workers' Compensation Insurance** in accordance with provisions of the California Labor Code

adequate to protect the CONTRACTOR from claims that may arise from its operations pursuant to the Workers' Compensation Act (Statutory Coverage). The Workers' Compensation Insurance coverage must also include Employers Liability coverage with limits of \$1,000,000/\$1,000,000/\$1,000,000.

- C. **Commercial Auto Liability Insurance** for all owned, non-owned or hired automobiles with a \$1 million combined single limit.

If no owned automobiles, then only hired and non-owned is required.

If CONTRACTOR uses a vehicle to travel to/from school sites, between schools and/or to/from students' homes or other locations as approved service locations by the LEA, CONTRACTOR must comply with State of California auto insurance requirements.

- D. **Errors & Omissions (E & O)/Malpractice (Professional Liability) coverage**, including Sexual Molestation and Abuse coverage, unless that coverage is afforded elsewhere in the Commercial General Liability policy by endorsement or separate policy, with the following limits:

\$1,000,000 per occurrence

\$2,000,000 general aggregate

- E. CONTRACTOR, upon execution of this contract and periodically thereafter upon request, shall furnish the LEA with certificates of insurance evidencing such coverage. The certificate of insurance shall include a ten (10) day non-renewal notice provision. The Commercial General Liability and Automobile Liability policy shall name the LEA and the Board of Education additional insured's premiums on all insurance policies and shall be paid by CONTRACTOR and shall be deemed included in CONTRACTOR's obligations under this contract at no additional charge **using the following language:**

- I. The following are each named as an additional insured for all liability arising out of the operations by or on behalf of the named insured, and this policy protects each additional insured and each of their governing boards, officers, agents and employees against liability for bodily injuries, deaths, or property damage or destruction in the performance of the Contract: Sonoma County Superintendent of Schools, Sonoma County Board of Education, Sonoma County CHARTER SELPA, and the SELPA Member Districts identified in the Sonoma County Special Education Local Planning Area Master Contract for Nonpublic, Nonsectarian School/Agency Services;
 - II. The inclusion of more than one insured shall not operate to impair the rights of one insured against another insured and the coverage herein shall apply, up to the stated limit, as though separate policies have been issued to each insured;
 - III. The insurance provided herein is primary and no insurance held or owned by any additional insured shall be called upon to contribute to a loss; and
 - IV. Coverage provided by this policy shall not be canceled or the dollar amount reduced without thirty (30) days prior written notice given to Sonoma County CHARTER SELPA
- F. Any deductibles or self-insured retentions above \$100,000 must be declared to and approved by the LEA. At its option, LEA may require the CONTRACTOR, at the CONTRACTOR's sole cost, to: (a) cause its insurer to reduce to levels specified by the LEA or eliminate such deductibles or self-insured retentions with respect to the LEA, its officials and employees, or (b) procure a bond guaranteeing payment of losses and related investigation.
- G. For any claims related to the services performed in connection with this Master Contract, the CONTRACTOR's insurance coverage shall be the primary insurance with respect to the LEA, its subsidiaries, officials and employees. Any insurance or self-insurance maintained by the LEA, its subsidiaries, officials and employees shall be excess of the CONTRACTOR's insurance and shall not contribute with it.

- H. All Certificates of Insurance must reference the contract number, name of the school or agency submitting the certificate, and the location of the school or agency submitting the certificate on the certificate.

PART II - INSURANCE REQUIREMENTS FOR NONPUBLIC SCHOOLS AFFILIATED WITH A RESIDENTIAL TREATMENT FACILITY (“RTC”)

When CONTRACTOR is a NPS affiliated with a **residential treatment center (NPS/RTC)**, the following insurance policies are required:

- A. **Commercial General Liability** including both bodily injury and property damage, with limits as follows: \$3,000,000 per Occurrence and \$6,000,000 in General Aggregate.

The policy shall be endorsed to name the LEA and the Board of Education as *named* additional insured and shall provide specifically that any insurance carried by the LEA which may be applicable to any claims or loss shall be deemed excess and the RTC’s insurance primary despite any conflicting provisions in the RTC’s policy. Coverage shall be maintained with no Self-Insured Retention above \$100,000 without the prior written approval of the LEA.

- B. **Workers’ Compensation Insurance** in accordance with provisions of the California Labor Code adequate to protect the RTC from claims that may arise from its operations pursuant to the Workers’ Compensation Act (Statutory Coverage). The Workers’ Compensation Insurance coverage must also include Employers Liability coverage with limits of \$1,000,000/\$1,000,000/\$1,000,000.
- C. **Commercial Auto Liability** coverage with limits of \$1,000,000 Combined Single Limit per Occurrence if the RTC does not operate a student bus service. If the RTC provides student bus services, the required coverage limit is \$5,000,000 Combined Single Limit per Occurrence.
- D. **Fidelity Bond or Crime Coverage** shall be maintained by the RTC to cover all employees who process or otherwise have responsibility for RTC funds, supplies, equipment or other assets. Minimum amount of coverage shall be \$250,000 per occurrence, with no self-insured retention.
- E. **Professional Liability/Errors & Omissions/Malpractice** coverage with minimum limits of \$3,000,000 per occurrence and \$6,000,000 general aggregate.
- F. **Sexual Molestation and Abuse Coverage**, unless that coverage is afforded elsewhere in the Commercial General Liability or Professional liability policy by endorsement, with minimum limits of \$3,000,000 per occurrence and \$6,000,000 general aggregate.

If LEA or CONTRACTOR determines that a change in insurance coverage obligations under this section is necessary, either party may reopen negotiations to modify the insurance obligations.

16. INDEMNIFICATION AND HOLD HARMLESS

To the fullest extent allowed by law, CONTRACTOR shall indemnify and hold LEA and its Board Members, administrators, employees, agents, attorneys, volunteers, and subcontractors (“LEA Indemnities”) harmless against all liability, loss, damage and expense (including reasonable attorneys’ fees) resulting from or arising out of this Master Contract or its performance, to the extent that such loss, expense, damage or liability was proximately caused by negligence, intentional act, or willful act or omission of CONTRACTOR, including, without limitation, its agents, employees, subcontractors or anyone employed directly or indirectly by it (excluding LEA and LEA Indemnities). The duty and obligation to defend shall arise immediately upon tender of a claim or lawsuit to the CONTRACTOR and/or to the LEA and the Member District(s) regarding services arising out of this Master Contract or its performance. The LEA and the Member District(s) shall work with the CONTRACTOR to select legal representation, with the final determination regarding legal representation to be

made by the LEA and the Member District(s). The LEA and the Member District(s) will use best efforts to select legal representation approved by CONTRACTOR's applicable insurance carrier.

To the fullest extent allowed by law, LEA shall indemnify and hold CONTRACTOR and its Board Members, administrators, employees, agents, attorneys, and subcontractors ("CONTRACTOR Indemnities") harmless against all liability, loss, damage and expense (including reasonable attorneys' fees) resulting from or arising out of this Master Contract or its performance thereof, to the extent that such loss, expense, damage or liability was proximately caused by the negligent, intentional act or willful act or omission of LEA, including, without limitation, its agents, employees, subcontractors or anyone employed directly or indirectly by it (excluding CONTRACTOR and/or any CONTRACTOR Indemnities).

LEA represents that it is self-insured in compliance with the laws of the State of California, that the self-insurance covers district employees acting within the course and scope of their respective duties and that its self-insurance covers the LEA's indemnification obligations under this Master Contract.

17. INDEPENDENT CONTRACTOR

Nothing herein contained will be construed to imply a joint venture, partnership or principal-agent relationship between the LEA and CONTRACTOR. CONTRACTOR shall provide all services under this Contract as an independent contractor, and neither party shall have the authority to bind or make any commitment on behalf of the other. Nothing contained in this Contract shall be deemed to create any association, partnership, joint venture or relationship of principal and agent, master and servant, or employer and employee between the parties or any affiliates of the parties, or between the LEA and any individual assigned by CONTRACTOR to perform any services for the LEA.

If the LEA is determined to be a partner, joint venture, co-principal, employer or co-employer of CONTRACTOR, CONTRACTOR shall indemnify and hold harmless the LEA from and against any and all claims for loss, liability, or damages arising from that determination, as well as any expenses, costs, taxes, penalties and interest charges incurred by the LEA as a result of that holding.

18. SUBCONTRACTING; EXHIBIT R

CONTRACTOR shall not assign or enter into subcontracts for any of the services contemplated, including transportation, under this Contract without first obtaining written approval from SELPA (EXHIBIT R). Such subcontract(s) or assignment(s) and approval(s) shall be attached and made part of this Contract.

In the event LEA determines that it can provide the subcontracted service(s) at a lower rate, LEA may elect to provide such service(s).

If LEA elects to provide such service(s), LEA shall provide written notification to CONTRACTOR within ten (10) days of receipt of CONTRACTOR's original notice and CONTRACTOR shall not subcontract for said service(s).

CONTRACTOR shall incorporate all of the provisions of this Master Contract in all subcontracts, to the fullest extent reasonably possible. Furthermore, when CONTRACTOR enters into subcontracts for the provision of special education and/or related services (including without limitation transportation) for any student, CONTRACTOR shall cause each subcontractor to procure and maintain insurance during the term of each subcontract. Such subcontractor's insurance shall comply with the provisions of Section 15. Each subcontractor shall furnish the LEA with original endorsements and certificates of insurance effecting coverage required by Section 15. The endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. The endorsements are to be on forms as required by the LEA. All endorsements are to be received and

approved by the LEA before the subcontractor's work commences. The Commercial General Liability and Automobile Liability policies shall name the LEA/SELPA and the LEA Board of Education as additional insured.

As an alternative to the LEA's forms, a subcontractor's insurer may provide complete, certified copies of all required insurance policies, including endorsements affecting the coverage required by this Master Contract. All Certificates of Insurance must reference the LEA contract number, name of the school or agency submitting the certificate, indication if NPS or NPA, and the location of the school or agency submitting the certificate. In addition, all subcontractors must meet the requirements as contained in Section 45 Clearance Requirements and Section 46 Staff Qualifications of this Master Contract.

19. CONFLICTS OF INTEREST

CONTRACTOR shall provide to LEA upon request a copy of its current bylaws and a current list of its Board of Directors (or Trustees), if it is incorporated. CONTRACTOR and any member of its Board of Directors (or Trustees) shall disclose any relationship with LEA that constitutes or may constitute a conflict of interest pursuant to California Education Code section 56042 and Government Code Section 1090 including, but not limited to, employment with LEA, provision of private party assessments and/or reports, and attendance at IEP team meetings acting as a student's advocate. Pursuant to California Education code section 56042, an attorney or advocate for a parent of an individual with exceptional needs shall not recommend placement at CONTRACTOR's facility if the attorney or advocate is employed or contracted by the CONTRACTOR, or will receive a benefit from the CONTRACTOR, or otherwise has a conflict of interest.

Unless CONTRACTOR and LEA otherwise agree in writing LEA shall neither execute an ISA with CONTRACTOR nor amend an existing ISA for a student when a recommendation for special education and/or related services is based in whole or in part on assessment(s) or reports provided by CONTRACTOR to the student without prior written authorization by LEA. This paragraph shall apply to CONTRACTOR regardless of when an assessment is performed or a report is prepared (i.e. before or after the student is enrolled in CONTRACTOR's school/agency) or whether an assessment of the student is performed or a report is prepared in the normal course of the services provided to the student by CONTRACTOR. To avoid conflict of interest, and in order to ensure the appropriateness of an Independent Educational Evaluation (hereinafter referred to as "IEE") and its recommendations, the LEA may, in its discretion, not fund an IEE by an evaluator who provides ongoing service(s) or is sought to provide service(s) to the student for whom the IEE is requested. Likewise, the LEA may, in its discretion, not fund services through the evaluator whose IEE the LEA agrees to fund. When no other appropriate assessor is available, LEA may request and if CONTRACTOR agrees, the CONTRACTOR may provide an IEE.

CONTRACTOR shall not admit a student living within the jurisdictional boundaries of the LEA on a private pay or tuition free "scholarship" basis and concurrently or subsequently advise/request parent(s) to pursue funding for the admitted school year from the LEA through due process proceedings.

20. NON-DISCRIMINATION

CONTRACTOR shall not, in employment or operation of its programs, unlawfully discriminate on the basis of gender, nationality, national origin, ancestry, race, color, ethnicity, ethnic group affiliation, religion, age, marital status, pregnancy or parental status, sex, sexual orientation, gender, gender identity, or expression, physical or mental disability, genetic information or any other classification protected by federal or state law or the perception

of one or more of such characteristics or association with a person or group with one or more of these actual or perceived characteristics

EDUCATIONAL PROGRAM

21. FREE AND APPROPRIATE PUBLIC EDUCATION (FAPE)

The LEA shall provide CONTRACTOR with a copy of the IEP including the Individualized Transition Plan (hereinafter referred to as “ITP”) of each student served by CONTRACTOR. CONTRACTOR shall provide special education and/or related services (including transition services) to each student within the NPS/A consistent with the student’s IEP and as specified in the ISA. If CONTRACTOR is a NPS, CONTRACTOR shall not accept a student if it cannot provide or ensure the provision of the services outlined in the student’s IEP. If student services are provided by a third party (i.e. Related Services Provider), CONTRACTOR shall notify LEA if provision of services cease.

Unless otherwise agreed to between CONTRACTOR and LEA, CONTRACTOR shall be responsible for the provision of all appropriate supplies, equipment, and/or facilities, as specified in the student’s IEP and ISA. CONTRACTOR shall make no charge of any kind to parents for special education and/or related services as specified in the student’s IEP and ISA (including, but not limited to, screenings, assessments, or interviews that occur prior to or as a condition of the student’s enrollment under the terms of this Master Contract). LEA shall provide low incidence equipment for eligible students with low incidence disabilities when specified in the student’s IEP and ISA. Such equipment remains the property of the SELPA/LEA and shall be returned to the SELPA/LEA when the IEP team determines the equipment is no longer needed or when the student is no longer enrolled in the NPS. CONTRACTOR shall ensure that facilities are adequate to provide LEA students with an environment which meets all pertinent health and safety regulations. CONTRACTOR may charge a student’s parent(s) for services and/or activities not necessary for the student to receive a free appropriate public education after: (a) written notification to the student’s parent(s) of the cost and voluntary nature of the services and/or activities; and (b) receipt by the LEA of the written notification and a written acknowledgment signed by the student’s parent(s) of the cost and voluntary nature of the services and/or activities. CONTRACTOR shall adhere to all LEA requirements concerning parent acknowledgment of financial responsibility.

Voluntary services and/or activities not necessary for the student to receive a free appropriate public education shall not interfere with the student’s receipt of special education and/or related services as specified in the student’s IEP and ISA unless the LEA, CONTRACTOR, and PARENT agree otherwise in writing.

22. GENERAL PROGRAM OF INSTRUCTION

All NPS/A shall be provided consistent with the area of certification specified by CDE Certification and as defined in California Education Code section 56366 et seq.,.

When CONTRACTOR is a NPS, CONTRACTOR’s general program of instruction shall: (a) utilize evidence-based practices and be consistent with LEA’s standards regarding the particular course of study and curriculum; (b) include curriculum that addresses mathematics, literacy and the use of educational, assistive technology and transition services; (c) be consistent with CDE’s standards regarding the particular course of study and curriculum; (d) provide the services as specified in the student’s IEP and ISA. Students shall have access to: (a) State Board of Education (SBE) - adopted Common Core State Standards (“CCSS”) for curriculum and the same instructional materials for kindergarten and grades 1 to 8, inclusive; and provide standards – aligned core curriculum and instructional materials for grades 9 to 12, inclusive, used by an LEA

that contracts with the NPS: (b) college preparation courses; (c) extracurricular activities, such as art, sports, music and academic clubs; (d) career preparation and vocational training, consistent with transition plans pursuant to state and federal law and; (e) supplemental assistance, including individual academic tutoring, psychological counseling, and career and college counseling.

When CONTRACTOR serves students in grades 9 through 12 inclusive, LEA shall provide to CONTRACTOR a specific list of the course requirements to be satisfied by the CONTRACTOR leading toward graduation or completion of LEA's diploma requirements. CONTRACTOR shall not award a high school diploma to students who have not successfully completed all of the LEA's graduation requirements.

When CONTRACTOR is an NPA and/or related services provider, CONTRACTOR's general program of instruction and/or services shall utilize evidence-based practices and be consistent with LEA and CDE guidelines and certification, and provided as specified in the student's IEP and ISA. The NPA providing Behavior Intervention services shall develop a written plan that specifies the nature of their NPA service for each student within thirty (30) days of enrollment and shall be provided in writing to the LEA. School-based services may not be unilaterally converted by CONTRACTOR to a substitute program or provided at a location not specifically authorized by the IEP team. Except for services provided by a CONTRACTOR that is a Licensed Children's Institution (LCI), all services not provided in the school setting require the presence of a parent, guardian or adult caregiver during the delivery of services, provided such guardian or caregiver have a signed authorization by the parent or legal guardian to authorize emergency services as requested.

LCI CONTRACTORS shall ensure that appropriate and qualified residential or clinical staff is present during the provision of services under this Master Contract. CONTRACTOR shall immediately notify LEA in writing if no parent, guardian or adult caregiver is present. CONTRACTOR shall provide to LEA a written description of the services and location provided prior to the effective date of this Master Contract. CONTRACTORS providing Behavior Intervention services must have a trained behaviorist or trained equivalent on staff. It is understood that Behavior Intervention services are limited per CDE Certification and do not constitute as an instructional program.

When CONTRACTOR is a NPA, CONTRACTOR shall not provide transportation nor subcontract for transportation services for students unless the LEA and CONTRACTOR agree otherwise in writing.

23. INSTRUCTIONAL MINUTES

When CONTRACTOR is a NPS, the total number of instructional minutes per school day provided by CONTRACTOR shall be at least equivalent to the number of instructional minutes per school day provided to students at like grade level attending LEA schools and shall be specified in the student's ISA developed in accordance with the student's IEP.

For students in grades kindergarten through 12 inclusive, unless otherwise specified in the student's IEP and ISA, the number of instructional minutes, excluding breakfast, recess, lunch and passing time shall be at the same level that Ed. Code. prescribes for the LEA.

The total number of annual instructional minutes shall be at least equivalent to the total number of annual instructional minutes provided to students attending LEA schools in like grade level unless otherwise specified in the student's IEP.

When CONTRACTOR is a NPA and/or related services provider, the total number of minutes per school day provided by CONTRACTOR shall be specified in the student's ISA developed in accordance with the student's IEP.

24. CLASS SIZE

When CONTRACTOR is a NPS, CONTRACTOR shall ensure that the number of pupils loaded to a class shall not exceed twelve (12) pupils for grades K – 5, and fourteen (14) pupils for grades 6 – 13. CONTRACTOR shall provide written notice to each LEA with students enrolled in a class for grades K-5 that exceeds twelve (12) pupils.

If CONTRACTOR provides special education for individuals with exceptional needs between the ages of three (3) and five (5) years, inclusive, CONTRACTOR shall comply with the appropriate instructional adult to child ratios pursuant to California Education Code § 56440 et seq.

In the event a NPS is unable to fill a vacant teaching position responsible for direct instruction to students, and the vacancy has direct impact on the CDE Certification of that school, the NPS shall develop a plan to ensure appropriate coverage of students by first utilizing existing certificated staff. The NPS and the LEA may agree to one 30 school day period per contract year where class size may be increased to ensure coverage by an appropriately credentialed teacher. Such an agreement shall be in writing and signed by both parties. This provision does not apply to a NPA.

CONTRACTOR providing special education instruction for individuals with exceptional needs between the ages of three and five years, inclusive, shall also comply with the appropriate instructional adult to child ratios pursuant to California Education Code sections 56440 et seq.

25. CALENDARS; EXHIBIT K

When CONTRACTOR is a NPS, CONTRACTOR shall submit to the LEA/SELPA a school calendar with the total number of billable days not to exceed 180 days, plus extended school year billable days equivalent to the number of days determined by the LEA's extended school year calendar. Billable days shall include only those days that are included on the submitted and approved school calendar, and/or required by the IEP (developed by the LEA) for each student. CONTRACTOR shall not be allowed to change its school calendar and/or amend the number of billable days without the prior written approval of the LEA. Nothing in this Master Contract shall be interpreted to require the LEA to accept any requests for calendar changes.

Unless otherwise specified by the student's' IEP, educational services shall occur at the school site. A student shall only be eligible for extended school year services as determined by the IEP team and the provision of such is specifically included in the ISA. Extended school year shall consist of twenty (20) instructional days, unless otherwise agreed upon by the IEP team convened by the LEA. Any days of extended school year in excess of twenty (20) billable days must be mutually agreed to, in writing, prior to the start of the extended school year.

Student must have actually been in attendance during the regular school year and/or during extended school year and received services on a billable day of attendance in order for CONTRACTOR to be eligible for payment. It is specifically understood that services may not be provided on weekends/holidays and other times when school is not in session, unless agreed to by the LEA, in writing, in advance of the delivery of any nonpublic school service. Any instructional days provided without this written agreement shall be at the sole financial responsibility of the CONTRACTOR.

CONTRACTOR shall observe the same legal holidays as LEA. Those holidays are Labor Day, Veteran's Day, Thanksgiving Day, Christmas Day, New Year's Day, Martin Luther King, Jr. Day, President's Day, Memorial Day and Independence Day, Juneteenth. With the approval of LEA, CONTRACTOR may revise the date upon which CONTRACTOR closes in observance of any of the holidays observed by the LEA.

When CONTRACTOR is a NPA, CONTRACTOR shall be provided with a LEA- developed/approved calendar prior to the initiation of services. CONTRACTOR herein agrees to observe holidays as specified in the

LEA-developed/approved calendar. CONTRACTOR shall provide services pursuant to the LEA-developed/approved calendar; or as specified in the LEA student's IEP and ISA. Unless otherwise specified in the LEA student's ISA, CONTRACTOR shall provide related services to LEA students on only those days that the LEA student's school of attendance is in session and the LEA student attends school. CONTRACTOR shall bill only for services provided on billable days of attendance as indicated on the LEA calendar unless CONTRACTOR and the LEA agree otherwise, in writing. Student must have actually been in attendance and/or received services on a billable day of attendance in order for CONTRACTOR to be eligible for payment. It is specifically understood that services may not be provided on weekends/holidays and other times when school is not in session, unless agreed to by the LEA, in writing, in advance of the delivery of any NPA service provided by CONTRACTOR. Any instructional days provided without this written agreement shall be at the sole financial responsibility of the CONTRACTOR.

26. DATA REPORTING; EXHIBITS A-G & J-R

CONTRACTOR shall agree to provide to the LEA all data related to student information and billing information with LEA. CONTRACTOR shall agree to provide data related to all sections of this contract, including student discipline as noted below, and requested by and in the format required by the LEA. ~~It is understood that all NPS/A will utilize the LEA approved electronic IEP system for all IEP development, service tracking documentation, and progress reporting, unless otherwise agreed to by the LEA.~~ It is understood that all NPS/A may utilize the LEA approved electronic IEP system for all IEP development, service tracking documentation, and progress reporting upon LEA approval. Additional progress reporting may be required by the LEA. The LEA shall may provide the CONTRACTOR with appropriate software, user training and proper internet permissions to allow adequate access.

Using forms developed by the CDE or as otherwise mutually agreed upon by CONTRACTOR and LEA, CONTRACTOR shall provide LEA, on a monthly basis, a written report of all incidents in which a statutory offense is committed by any LEA student, regardless if it results in a disciplinary action of suspension or expulsion. This includes all statutory offenses described as described in Education Codes sections 48900 and 48915. CONTRACTOR shall also include incidents resulting in the use of a behavioral restraint and/or seclusion even if they were not a result of a violation of Education Code sections 48900 and 48915.

The LEA shall provide the CONTRACTOR with approved forms and/or format for such data including, but not limited to, invoicing, attendance reports and progress reports. The LEA may approve use of CONTRACTOR'S provided forms at their discretion.

27. LEAST RESTRICTIVE ENVIRONMENT/DUAL ENROLLMENT

CONTRACTOR and LEA shall follow all LEA policies and procedures that support Least Restrictive Environment ("LRE") options and/or dual enrollment options if available and appropriate, for students to have access to the general curriculum and to be educated with their nondisabled peers to the maximum extent appropriate.

CONTRACTOR and LEA shall ensure that LRE placement options are addressed at all IEP team meetings regarding students for whom ISAs have been or may be executed. This shall include IEP team consideration of supplementary aids and services, goals and objectives necessary for placement in the LRE and necessary to enable students to transition to less restrictive settings.

When an IEP team has determined that a student should be transitioned into the public school setting, CONTRACTOR shall assist the LEA in implementing the IEP team's recommended activities to support the transition.

28. STATEWIDE ACHIEVEMENT TESTING

When CONTRACTOR is a NPS, per implementation of Senate Bill 484, CONTRACTOR shall administer all statewide assessments within the California Assessment of Student Performance and Progress (“CAASPP”), Desired Results Developmental Profile (“DRDP”), California Alternative Assessment (“CAA”), achievement and abilities tests (using LEA-authorized assessment instruments), the Fitness Gram, the English Language Proficiency Assessments for California (“ELPAC”), the Alternative English Language Proficiency Assessments for California (“Alternative ELPAC”), and as appropriate to the student, and mandated by LEA pursuant to LEA and state and federal guidelines.

CONTRACTOR is subject to the alternative accountability system developed pursuant to Education Code section 52052, in the same manner as public schools. Each LEA student placed with CONTRACTOR by the LEA shall be tested by qualified staff of CONTRACTOR in accordance with that accountability program. LEA shall provide test administration training to CONTRACTOR’S qualified staff. CONTRACTOR shall attend LEA test training and comply with completion of all coding requirements as required by LEA; **or at sole discretion of the LEA, the LEA will administer the tests.**

29. MANDATED ATTENDANCE AT LEA MEETINGS

CONTRACTOR shall attend District mandated meetings when legal mandates, and/or LEA policy and procedures are reviewed, including but not limited to the areas of: curriculum, high school graduation, standards-based instruction, behavior intervention, cultural and linguistic needs of students with disabilities, dual enrollment responsibilities, LRE responsibilities, transition services, data collection and standardized testing and IEPs. LEA shall provide CONTRACTOR with reasonable notice of mandated meetings. Attendance at such meetings does not constitute a billable service hour(s).

30. POSITIVE BEHAVIOR INTERVENTIONS AND SUPPORTS; EXHIBIT O & L

CONTRACTOR shall comply with the requirements of Education Code section 49005, et seq., 56521.1 and 56521.2. LEA students who exhibit behaviors that interfere with their learning or the learning of others must receive timely and appropriate assessments and positive supports and interventions in accordance with the federal law and it’s implementing regulations. If the IEP determines that a student’s behavior impedes his or her learning or the learning of others, the IEP team is required to consider the use of positive behavioral interventions and supports, and other strategies, to address that behavior, consistent with Section 1414(d)(3)(B)(i) and (d)(4) of Title 20 of the United States Code and associated federal regulations. This could mean that instead of developing a Behavior Intervention Plan (“BIP”), the IEP team may conclude it is sufficient to address the student’s behavioral problems through the development of behavioral goals and behavioral interventions to support those goals.

CONTRACTOR shall maintain a written policy pursuant to California Education Code section 56521.1 regarding emergency interventions and behavioral emergency reports (EXHIBIT L). CONTRACTOR shall ensure that all of its staff members are trained in crisis intervention, emergency procedures, and evidence-based practices and interventions specific to the unique behavioral needs of CONTRACTOR’s pupil population. The training shall be provided within 30 days of employment to new staff who have any contact or interaction with pupils during the schoolday, and annually to all staff who have any contact or interaction with pupils during the school day. The CONTRACTOR shall select and conduct the training in accordance with California Education Code section 56366.1. CONTRACTOR shall maintain written records of the training and provide written verification of the training annually and upon request.

Pursuant to Education Code section 56521.1, emergency interventions shall not be used as a substitute for a BIP, and shall not be employed longer than necessary to contain the behavior. Emergency interventions may only be used to control unpredictable, spontaneous behavior that poses clear and present danger of serious physical harm to the individual with exceptional needs, or others, and that cannot be immediately prevented by a response less restrictive than the temporary application of a technique used to contain the behavior. If a situation requires prolonged use of emergency intervention, staff must seek assistance from the school site administrator or a law enforcement agency.

CONTRACTOR shall complete a behavior emergency report when an emergency occurs that is defined as a serious, dangerous behavior that staff has determined to present a clear and present danger to others. It requires a non-violent physical intervention to protect the safety of student, self, or others and a physical intervention has been used; or a physical intervention has not been used, but an injury or serious property damage has occurred. Personal Safety Techniques may or may not have been used. The SELPA Behavioral Emergency Report (EXHIBIT L) is to be completed by CONTRACTOR the same day of the use of an emergency intervention with a student with exceptional needs or if serious property damage is caused by a student with exceptional needs. The LEA must be faxed and/or e-mailed a copy of the Behavioral Emergency Report no later than the end of the day that the emergency intervention was used or if serious property damage occurs. CONTRACTOR shall notify Parent within twenty-four (24) hours.

If the student's IEP does not contain a BIP an IEP team shall schedule a meeting to review the behavior emergency report, determine if there is a necessity for a functional behavioral assessment (Exhibit O), and to determine an interim plan. CONTRACTOR shall notify the LEA of the need to schedule an IEP meeting within two (2) days.

If the student already has a BIP, the IEP team shall review and modify the BIP if a new serious behavior has been exhibited or existing behavioral interventions have proven to be ineffective. If a Behavioral Emergency Report was written regarding a student with exceptional needs who did have a behavioral intervention plan then CONTRACTOR shall notify the LEA Administrator so that the incident is referred to the IEP team to review and determine if the incident constitutes a need to modify the positive behavioral intervention plan.

Pursuant to Education Code section 56521.2, CONTRACTOR shall not authorize, order, consent to, or pay for the following interventions, or any other interventions similar to or like the following:

1. any intervention that is designed to, or likely to, cause physical pain, including, but not limited to, electric-shock;
2. an intervention that involves the release of noxious, toxic, or otherwise unpleasant sprays, mists, or substances in proximity to the face of the individual;
3. an intervention that denies adequate sleep, food, water, shelter, bedding, physical comfort, or access to bathroom facilities;
4. an intervention that is designed to subject, used to subject, or likely to subject, the individual to verbal abuse, ridicule, or humiliation, or that can be expected to cause excessive emotional trauma;
5. restrictive interventions that employ a device, material, or objects that simultaneously immobilize all four extremities, including the procedure known as prone containment, except that prone containment or similar techniques may be used by trained personnel as a limited emergency intervention;
6. locked seclusion, unless it is in a facility otherwise licensed or permitted by state law to use a locked room;
7. an intervention that precludes adequate supervision of the individual;
8. an intervention that deprives the individual of one or more of his or her senses.

CONTRACTOR shall comply with Education Code section 49005.8. Specifically, Contractor shall not do any

of the following:

1. Use seclusion or a behavioral restraint for the purpose of coercion, discipline, convenience, or retaliation.
2. Use locked seclusion, unless it is in a facility otherwise licensed or permitted by the state law to use a locked room.
3. Use a physical restraint technique that obstructs a pupil's respiratory airway or impairs the pupil's breathing or respiratory capacity, including techniques in which a staff member places pressure on a pupil's back or places his or her body weight against the pupil's torso or back.
4. Use a behavioral restraint technique that restricts breathing, including, but not limited to, using a pillow, blanket, carpet, mat, or other item to cover a pupil's face.
5. Place a pupil in a facedown position with the pupil's hands held or restrained behind the pupil's back.
6. Use a behavioral restraint for longer than is necessary to contain the behavior that poses a clear and present danger of serious physical harm to the pupil or others.

CONTRACTOR shall keep constant, direct observation of a pupil who is in seclusion, which may be through observation of the pupil through a window, or another barrier, through which the educational provider is able to make direct eye contact with the pupil. This observation shall not be through indirect means, including through a security camera or a closed-circuit television.

CONTRACTOR shall afford pupils who are restrained the least restrictive alternative and the maximum freedom of movement, and shall use the least number of restraint points, while ensuring the physical safety of the pupil and others.

If prone restraint techniques are used by CONTRACTOR, a staff member shall observe the pupil for any signs of physical distress throughout the use of prone restraint. Whenever possible, the staff member monitoring the pupil shall not be involved in restraining the pupil.

In the case of a child whose behavior impedes the child's learning or that of others, the IEP team shall consider the use of positive behavioral interventions and supports, and other strategies, to address that behavior, consistent with Section 1414(d)(3)(B)(i) and (d)(4) of Title 20 of the United States Code and associated federal regulations.

All restraint practices must be reviewed and revised when they have an adverse effect on a student and are used repeatedly for an individual child, either on multiple occasions within the same classroom or multiple uses by the same individual. CONTRACTOR shall notify the student's parent/guardian when any type of physical or mechanical restraint or seclusion has been used. Upon the use of any type of physical or mechanical restraint or seclusions of a LEA student, CONTRACTOR shall complete a BER per the reporting and notification requirements listed above.

31. STUDENT DISCIPLINE; EXHIBIT M

CONTRACTOR shall maintain and abide by a written policy for student discipline that is consistent with state and federal law and regulations. Using forms developed by the California Department of Education or as otherwise mutually agreed upon by CONTRACTOR and LEA, CONTRACTOR shall provide LEA, on a monthly basis, a written report of all incidents in which a statutory offense is committed by any LEA student, regardless if it results in a disciplinary action of suspension or expulsion. This includes all statutory offenses as described in Education Code 48900 and 48915. CONTRACTOR shall also include incidents resulting in the

use of a behavioral restraint and/or seclusion even if they were not a result of a violation of Education Code Sections 48900 and 48915.

CONTRACTOR shall notify LEA within five (5) days and provide all related written documentation each time a pupil is suspended, including the reason for said suspension on SELPA Suspension & Expulsion Data Collection Form (EXHIBIT M).

When CONTRACTOR seeks to remove a student from his/her current educational placement for disciplinary reasons, CONTRACTOR shall immediately submit a written discipline report to the LEA. Written discipline reports shall include, but not be limited to: the student's name; the time, date, and description of the misconduct; the disciplinary action taken by CONTRACTOR; and the rationale for such disciplinary action. A copy of the student's behavior plan, if any, shall be submitted with the written discipline report. CONTRACTOR and LEA agree to participate in a manifestation determination at an IEP meeting no later than the tenth (10th) day of suspension. LEA shall notify and invite CONTRACTOR representatives to the IEP team meeting where the manifestation determination will be made.

32. IEP TEAM MEETINGS

An IEP team meeting shall be convened at least annually to evaluate: (1) the educational progress of each student placed with CONTRACTOR, including all state assessment results pursuant to the requirements of Education Code section 52052; (2) whether or not the needs of the student continue to be best met at the NPS; and (3) whether changes to the student's IEP are necessary, including whether the student may be transitioned to a **different** public school setting. (California Education Code sections 56366 (a) (2) (B) (i) and (ii)) and pursuant to California Education Code section 56345 (b) (4).) The notice shall be provided at least ten (10) days prior to the meeting except as otherwise permitted by law. At least twenty (20) days before any IEP/ITP meeting, CONTRACTOR shall notify LEA if the pupil's parent/guardian requires a translator.

If the LEA student is to be transferred from a NPS setting into a regular class setting in a public school for any part of the school day, the IEP team shall document, a description of activities provided to integrate the student into the regular education program, including the nature of each activity as well as the time spent on the activity each day or week and a description of the activities provided to support the transition of the student from the special education program into the regular education program. Each student shall be allowed to provide confidential input to any representative of his or her IEP team. Except as otherwise provided in the Master Contract, CONTRACTOR and LEA shall participate in all IEP team meetings regarding students for whom ISAs have been or may be executed. At any time during the term of this Master Contract, the parent, the CONTRACTOR or the LEA may request a review of the student's IEP, subject to all procedural safeguards required by law, including reasonable notice given to, and participation of, the CONTRACTOR in the meeting. Every effort shall be made to schedule IEP team meetings at a time and place that is mutually convenient to parent, CONTRACTOR and LEA. CONTRACTOR shall provide to LEA assessments and written assessment reports by service providers upon request and/or pursuant to LEA policy and procedures. It is understood that attendance at an IEP meeting is part of CONTRACTOR'S professional responsibility and is not a billable service under this Master Contract.

It is understood that the CONTRACTOR **shall may** utilize the approved electronic IEP system of the LEA for all IEP planning and progress reporting at the LEA's discretion. The LEA or SELPA may provide training for any CONTRACTOR to ensure access to the approved system. The CONTRACTOR shall maintain confidentiality of all IEP data on the approved system and shall protect the password requirements of the system. When a student dis-enrolls from the NPS/NPA, the NPS/NPA and LEA shall discontinue use of the approved system for that student.

Changes in any student's educational program, including instruction, services, or instructional setting provided under this Master Contract, may only be made on the basis of revisions to the student's IEP. In the event that

the CONTRACTOR believes the student requires a change of placement, the CONTRACTOR may request a review of the student's IEP for the purposes of consideration of a change in the student's placement. Student is entitled to remain in the last agreed upon and implemented placement unless parent agrees otherwise or an Interim Alternative Educational Setting is deemed lawful and appropriate by LEA or OAH consistent with Section 1415 (k)(1)(7) of Title 20 of the United States Code.

33. SURROGATE PARENTS AND FOSTER YOUTH

CONTRACTOR shall comply with LEA surrogate parent assignments. Surrogate parents shall serve as the child's parent and have all the rights relative to the student's education that a parent has under the Individuals with Disabilities Education Act pursuant to *20 USC 1414-1482 and 34 CFR 300.1-300.756*. A pupil in foster care shall be defined pursuant to California Education Code section 42238.01(b). The LEA shall annually notify the CONTRACTOR who the LEA has designated as the educational liaison for foster children. When a pupil in foster care is enrolled in a NPS by the LEA any time after the completion of the pupil's second year of high school, the CONTRACTOR shall schedule the pupil in courses leading towards graduation based on the diploma requirements of the LEA unless provided notice otherwise in writing pursuant to Section 51225.1.

34. DUE PROCESS PROCEEDINGS

CONTRACTOR shall fully participate in special education due process proceedings including mediations and hearings, as requested by LEA. Participation further includes the willingness to make CONTRACTOR's staff available for witness preparation and testimony as is necessary to facilitate a due process hearing. (If any compensation is requested for CONTRACTOR's Staff this shall be determined by an Agreement between CONTRACTOR and LEA). CONTRACTOR shall also fully participate in the investigation and provision of documentation related to any complaint filed with the State of California, the Office of Civil Rights, or any other state and/or federal governmental body or agency. Full participation shall include, but in no way be limited to, cooperating with LEA representatives to provide complete answers raised by any investigator and/or the immediate provision of any and all documentation that pertains to the operation of CONTRACTOR's program and/or the implementation of a particular student's IEP/Individual and Family Service Plan ("IFSP").

35. COMPLAINT PROCEDURES

CONTRACTOR shall maintain and adhere to its own written procedures for responding to parent complaints. These procedures shall include annually notifying and providing parents of students with appropriate information (including complaint forms) for the following: (1) Uniform Complaint Procedures pursuant to Title 5 of the California Code of Regulations section 4600 et seq.; (2) Nondiscrimination policy pursuant to Title 5 of the California Code of Regulations section 4960 (a); (3) Sexual Harassment Policy, California Education Code 231.5 (a) (b) (c); (4) Title IX Student Grievance Procedure, Title IX 106.8 (a) (d) and 106.9 (a); and (5) Notice of Privacy Practices in compliance with Health Insurance Portability and Accountability Act ("HIPAA"). CONTRACTOR shall include verification of these procedures to the LEA. CONTRACTOR shall immediately notify LEA of any written complaints filed against it related to LEA students and provide LEA with all documentation related to the complaints and/or its investigation of complaints, including any and all reports generated as a result of an investigation. CONTRACTOR shall work with and notify LEA within 24 hours of any written parent complaint.

36. STUDENT PROGRESS REPORTS/REPORT CARDS AND ASSESSMENTS

~~Unless LEA requests in writing that progress reports be provided on a monthly basis, CONTRACTOR shall provide to parents at least four (4) written progress reports/report cards. Or as required by a Pupil's IEP. At a~~

~~minimum, progress reports shall include progress over time towards IEP goals and objectives. A copy of the progress reports/report cards shall be maintained at the CONTRACTOR's place of business and shall be submitted to the LEA and LEA student's parent(s) quarterly. Or as required by a pupils IEP.~~

Unless LEA requests in writing that progress reports be provided on a monthly basis, CONTRACTOR shall provide to parents at least two (2) written progress reports/report cards. Or as required by a Pupil's IEP. At a minimum, progress reports shall include progress over time towards IEP goals and objectives. A copy of the progress reports/report cards shall be maintained at the CONTRACTOR's place of business and shall be submitted to the LEA based on a schedule determined by the LEA.

The CONTRACTOR shall also provide an LEA representative access to supporting documentation used to determine progress on any goal or objective, including but not limited to log sheets, observation notes, data sheets, pre/post tests, rubrics and other similar data collection used to determine progress or lack of progress on approved goals, objectives, transition plans or behavior intervention plans. The LEA may request such data at any time within five (5) years of the date of service. The CONTRACTOR shall provide this data supporting progress within five (5) business days of request. Additional time may be granted as needed by the LEA.

CONTRACTOR shall complete academic or other evaluations of the student ten (10) days prior to the student's annual or triennial review IEP team meeting for the purpose of reporting the student's present levels of performance at the IEP team meeting as required by state and federal laws and regulations and pursuant to LEA policies, procedures, and/or practices. CONTRACTOR shall make available of its reports, documents, and projected goals to share with members of the IEP team five (5) business days prior to the IEP meeting. CONTRACTOR shall maintain supporting documentation such as test protocols and data collection, which shall be made available to LEA within five (5) business days of request.

The CONTRACTOR is responsible for all evaluation costs regarding the updating of goals and objectives, progress reporting and development of present levels of performance. All assessments resulting from an assessment plan shall be provided by the LEA unless the LEA and CONTRACTOR agree that the CONTRACTOR will perform additional assessments. Any assessment and/or evaluation costs may be added to the ISA and/or approved separately by the LEA and CONTRACTOR with a mutual agreement.

It is understood that all billable hours must be in direct services to pupils as specified in the ISA. For NPA services, supervision provided by a qualified individual as specified in Title 5 Regulation, subsection 3065, shall be determined as appropriate and included in the ISA. Supervision means the direct observation of services, data review, case conferencing and program design consistent with professional standards for each professional's license, certification, or credential.

~~CONTRACTOR shall not charge the student's parent(s) or LEA for the provision of progress reports, report cards, evaluations conducted in order to obtain present levels of performance, interviews, and/or meetings. It is understood that all billable hours have limits to those specified on the ISA consistent with the IEP. It is understood that copies of data collection notes, forms, charts and other such data are part of the pupil's record and shall be made available to the LEA upon written request.~~

37. TRANSCRIPTS; EXHIBIT N

When CONTRACTOR is a NPS, CONTRACTOR shall prepare transcripts at the close of each semester, or upon student transfer, for students in grades nine (9) through twelve (12) inclusive, and submit them on LEA approved forms to the LEA for evaluation of progress toward completion of diploma, or alternate process requirements as specified in LEA Procedures (EXHIBIT N). CONTRACTOR shall submit to the LEA names

of students and the LEA for whom transcripts have been submitted as specified by the LEA.

38. STUDENT CHANGE OF RESIDENCE; EXHIBIT P

Within five (5) school days from the date CONTRACTOR becomes aware of a student's change of residence, CONTRACTOR shall notify LEA, in writing, of the student's change of residence (EXHIBIT P). Upon enrollment, CONTRACTOR shall notify parents in writing of their obligation to notify CONTRACTOR of the student's change of residence. CONTRACTOR shall maintain, and provide upon request by LEA, documentation of such notice to parents.

When the CONTRACTOR becomes aware of an emergency change of placement (e.g. hospitalization, juvenile hall, etc.), CONTRACTOR shall verbally notify LEA immediately (within 24 hours) and shall confirm the same in writing within-five (5) business days.

When CONTRACTOR becomes aware that a pupil placed into an LCI by another governmental agency and attending its NPS has changed residency, CONTRACTOR shall verbally notify LEA immediately (within 24 hours) and shall confirm the same in writing with five (5) business days on LEA approved forms.

If CONTRACTOR had knowledge or should reasonably have had knowledge of the student's change of residence boundaries and CONTRACTOR fails to follow the procedures specified in this provision, LEA shall not be responsible for the costs of services delivered following the student's change of residence.

39. WITHDRAWAL OF STUDENT FROM PROGRAM

CONTRACTOR shall immediately report electronically and in writing to the LEA within five (5) business days when an LEA student is withdrawn without prior notice from school and/or services, including student's change of residence to a residence outside of LEA service boundaries, and parent/guardian withdrawal of student against professional advice from a NPS/RTC.

40. PARENT ACCESS

CONTRACTOR shall provide for reasonable parental access to students and all facilities including, but not limited to, the instructional setting, recreational activity areas, meeting rooms and student living quarters, when applicable CONTRACTOR shall comply with any known court orders regarding parental visits and access to LEA students.

CONTRACTOR operating programs associated with a NPS/RTC shall cooperate with a parent's reasonable request for LEA student therapeutic visits in their home or at the NPS/RTC. CONTRACTOR shall require that parents obtain prior written authorization for therapeutic visits from the CONTRACTOR and the LEA at least thirty (30) days in advance. When requested CONTRACTOR shall facilitate all parent travel and accommodations and for providing travel information to the parent as appropriate. Payment by LEA for approved travel-related expenses shall be made directly through the LEA consistent with LEA Procedures.

CONTRACTOR providing services in the student's home as specified in the IEP shall ensure that at least one parent of the child, or an adult caregiver with written and signed authorization to make decisions in an emergency, is present. The names of any adult caregiver other than the parent shall be provided to the LEA prior to the start of any home based services, including written and signed authorization in emergency situations. The parent shall inform the LEA of any changes of caregivers and provide written authorization for emergencies. The adult caregiver cannot also be an employee or volunteer associated with the NPS/NPA service provider.

All problems and/or concerns reported to parents, both verbal and written, shall also be provided, in writing, to the LEA.

41. LICENSED CHILDREN’S INSTITUTION (“LCI”) CONTRACTORS AND RESIDENTIAL TREATMENT CENTER (“RTC”) CONTRACTORS

If CONTRACTOR is a LCI, CONTRACTOR shall adhere to all legal requirements regarding educational placements for LCI students as stated in Education Code 56366 (a) (2) (C), 56366.9 (c) (1), Health and Safety Code section 1501.1 and any other applicable laws and/or regulations, including LEA guidelines or procedures. An LCI shall not require that a pupil be placed in its NPS as a condition of being placed in its residential facility.

If CONTRACTOR is a nonpublic, NPS/RTC, CONTRACTOR shall adhere to all legal requirements under the Individuals with Disabilities Education Act (IDEA), 20 U.S.C. section 1400 et seq. including the federal regulations 34 C.F.R section 300 et seq. and Education Code section 56000 et seq. including Title 5 of the California Code of Regulations section 3000 et seq. CONTRACTOR shall comply with all monitoring requirements set forth in Section 43 below.

If CONTRACTOR is a NPS that is owned, operated by, or associated with a LCI, CONTRACTOR shall provide to LEA, on a quarterly basis, a list of all students, including those identified as eligible for special education. For those identified as special education students, the list shall include: 1) special education eligibility at the time of enrollment and; 2) the educational placement and services specified in each student’s IEP at the time of enrollment. A copy of the current IEP shall be provided to the LEA.

Unless placement is made pursuant to an Office of Administrative Hearings order or a lawfully executed agreement between LEA and parent, LEA is not responsible for the costs associated with NPS placement until the date on which an IEP team meeting is convened, the IEP team determines that a NPS placement is appropriate, and the IEP is signed by the student’s parent or another adult with educational decision-making rights.

In addition to meeting the certification requirements of the State of California, a CONTRACTOR that operates a program outside of this State shall be certified or licensed by that state to provide, respectively, special education and related services and designated instruction and related services to pupils under the federal Individuals with Disabilities Education Act (20 U.S.C. Sec. 1400 et seq.).

42. STATE MEAL MANDATE

When CONTRACTOR is a NPS, CONTRACTOR and LEA shall satisfy the State Meal Mandate under California Education Code sections 49501.5, the universal meal mandate enacted by AB 130 (2021-2022); 49530 et seq.; and 49550 et seq. LEA is responsible for assuring meals are provided in NPS. The LEA will either provide the meal or pay the NPS for the provision of meals. The LEA and CONTRACTOR shall negotiate the meal reimbursement rate.

43. MONITORING

When CONTRACTOR is an NPS, the LEA or SELPA shall conduct at least one onsite monitoring visit during each school year to the NPS at which the LEA has a pupil attending and with which it maintains a master contract. The monitoring visit shall include, but is not limited to, a review of services provided to the pupil through the ISA between the LEA and the NPS, a review of progress the pupil is making toward the goals set

forth in the pupil's individualized education program, a review of progress the pupil is making towards the goals set forth in the pupil's behavioral intervention plan, if applicable, an observation of the pupil during instruction, and a walkthrough of the facility. The LEA or SELPA shall report the findings resulting from the monitoring visit to the California Department of Education within 60 calendar days of the onsite visit. A copy of the report will be given to the NPS.

The LEA or SELPA shall conduct an onsite visit to the NPS before placement of a pupil if the LEA does not have any pupils enrolled at the school at the time of placement.

CONTRACTOR shall allow LEA representatives access to its facilities for additional periodic monitoring of each student's instructional program. LEA shall have access to observe each student at work, observe the instructional setting, interview CONTRACTOR, and review each student's records and progress. Such access shall include unannounced monitoring visits. When making site visits, LEA shall initially report to CONTRACTOR's site administrative office. CONTRACTOR shall be invited to participate in the review of each student's progress.

If CONTRACTOR is also an LCI and/or NPS/RTC, the CDE shall annually evaluate whether CONTRACTOR is in compliance with Education Code section 56366.9 and Health and Safety Code section 1501.1(b).

The State Superintendent of Public Instruction ("Superintendent") shall monitor CONTRACTOR'S facilities, the educational environment, and the quality of the educational program, including the teaching staff, the credentials authorizing service, the standards-based core curriculum being employed, and the standard focused instructional materials used on a three-year cycle, as follows: (1) CONTRACTOR shall complete a self-review in year one; (2) the Superintendent shall conduct an onsite review in year two; and (3) the Superintendent shall conduct a follow-up visit in year three.

CONTRACTOR shall participate in any LEA or CDE compliance review, if applicable, to be conducted as aligned with the CDE Onsite Review and monitoring cycle in accordance with California Education Code section 56366.1(j). This review will address programmatic aspects of the NPS, compliance with relevant state and federal regulations, and Master Contract compliance. CONTRACTOR shall conduct any follow-up or corrective action procedures related to review findings.

CONTRACTOR understands that LEA reserves the right to institute a program audit with or without cause. The program audit may include, but is not limited to, a review of core compliance areas of health and safety; curriculum/instruction; related services; and contractual, legal, and procedural compliance.

When CONTRACTOR is a NPS, CONTRACTOR shall collect all applicable data and prepare the applicable portion of a School Accountability Report Card as appropriate in accordance with California Education Code Section 33126.

PERSONNEL

44. CLEARANCE REQUIREMENTS

CONTRACTOR shall comply with the requirements of California Education Code sections 44237, 35021.1, 35021.2, and 56366.1 including, but not limited to: obtaining clearance from both the California Department of Justice (hereinafter referred to as "CDOJ") and clearance from the Federal Bureau of Investigation (hereinafter referred to as "FBI") for CONTRACTOR's employees and volunteers who will have or likely may have any direct contact with LEA students. CONTRACTOR hereby agrees that CONTRACTOR's

employees and volunteers shall not come in contact with students until CDOJ and FBI clearance are ascertained. CONTRACTOR shall certify in writing to LEA that none of its employees, and volunteers, unless CONTRACTOR determines that the volunteers will have no direct contact with students, or subcontractors who may come into contact with students have been convicted of a violent or serious felony as those terms are defined in California Education Code section 44237(h), unless despite the employee's conviction of a violent or serious felony, he or she has met the criteria to be eligible for employment pursuant to California Education Code section 44237 (i) or (j). Upon requests, clearance certification shall be submitted to the LEA. In addition, CONTRACTOR shall make a request for subsequent arrest service from CDOJ as required by California Penal Code section 11105.2 CONTRACTOR shall certify to LEA that they have successful background checks and enrolled in subsequent arrest notification service for all employees who may come into contact with students.

Notwithstanding the restrictions on sharing and destroying criminal background check information, CONTRACTOR, upon demand, shall make available to the LEA evidence of a successful criminal background check clearance and enrollment in subsequent arrest notification service, as provided, for each owner, operator, and employee of the NPS/A. CONTRACTOR is required to retain the evidence on-site, as specified, for all staff, including those licensed or credentialed by another state agency. Background clearances and proof of subsequent arrest notification service, as required by California Penal Code section 11105.2, for all staff shall be provided to the LEA upon request.

45. STAFF QUALIFICATIONS

CONTRACTOR shall ensure that all individuals employed, contracted, and/or otherwise hired by CONTRACTOR to provide classroom and/or individualized instruction or related services hold a license, certificate, permit, or other document equivalent to that which staff in a public school are required to hold in the service rendered consistent with Education Code section 56366.1(n)(1) and are qualified pursuant to Title 34 of the Code of Federal Regulations sections 200.56 and 200.58, and Title 5 of the California Code of Regulations sections 3001(r), 3064 and 3065. Such qualified staff may only provide related services within the scope of their professional license, certification or credential and ethical standards set by each profession, and not assume responsibility or authority for another related services provider or special education teacher's scope of practice.

CONTRACTOR shall ensure that all staff are appropriately credentialed to provide instruction and services to students with the disabling conditions placed in their program/school through documentation provided to the CDE (5 CCR 3064 (a)).

In accordance with California Education Code section 56366.1(a)(5) when CONTRACTOR is a NPS, an appropriately qualified person shall serve as curricular and instructional leader, and be able to provide leadership, oversight and professional development. The administrator of the NPS holds or is in the process of obtaining one of the following: (A) An administrative credential granted by an accredited postsecondary educational institution and two years of experience with pupils with disabilities. (B) A pupil personnel services credential that authorizes school counseling or psychology. (C) A license as a clinical social worker issued by the Board of Behavioral Sciences. (D) A license in psychology regulated by the Board of Psychology. (E) A master's degree issued by an accredited postsecondary institution in education, special education, psychology, counseling, behavioral analysis, social work, behavioral science, or rehabilitation. (F) A credential authorizing special education instruction and at least two years of experience teaching in special education before becoming an administrator. (G) A license as a marriage and family therapist certified by the Board of Behavioral Sciences. (H) A license as an educational psychologist issued by the Board of Behavioral Sciences. (I) A license as a professional clinical counselor issued by the Board of Behavioral Sciences. (California Education Code Section 56366.1 (a)(5)) CONTRACTOR shall maintain, and provide the LEA upon request, documentation of its administrator's qualification in accordance with the above.

CONTRACTOR shall comply with personnel standards and qualifications regarding instructional aides and teacher assistants respectively pursuant to federal requirements and California Education Code sections 45340 et seq. and 45350 et seq. Specifically, all paraprofessionals, including but not limited to, instructional aides and teacher assistants, employed, contracted, and/or otherwise hired or subcontracted by CONTRACTOR to provide classroom and/or individualized instruction or related services, shall possess a high school diploma (or its recognized equivalent) and at least one of the following qualifications: (a) completed at least two (2) years of study at an institution of higher education; or (b) obtained an associate's (or higher) degree; or (c) met a rigorous standard of quality and can demonstrate, through a formal state or local assessment (i) knowledge of, and the ability to assist in instructing, reading, writing, and mathematics; or (ii) knowledge of, and the ability to assist in instructing, reading readiness, writing readiness, and mathematics readiness, as appropriate. CONTRACTOR shall comply with all laws and regulations governing the licensed professions, including but not limited to, the provisions with respect to supervision.

In addition to meeting the certification requirements of the State of California, a CONTRACTOR that operates a program outside of this state and serving a student by this LEA shall be certified or licensed by that state to provide special education and related services to pupils under the federal Individuals with Disabilities Education Act (20 U.S.C. Sec. 1400 et seq.).

46. VERIFICATION OF LICENSES, CREDENTIALS & OTHER DOCUMENTS; EXHIBIT C

CONTRACTOR shall submit to LEA a staff list (EXHIBIT C), and copies of all current licenses, credentials, certifications, permits and/or other documents which entitle the holder to provide special education and/or related services by individuals employed, contracted, and/or otherwise hired or sub-contracted by CONTRACTOR. CONTRACTOR shall ensure that all licenses, credentials, permits or other documents are on file at the office of the County Superintendent of Schools. CONTRACTOR shall notify LEA in writing within thirty (30) days when personnel changes occur which may affect the provision of special education and/or related services to students as specified in the LEA Procedures. CONTRACTOR shall provide the LEA with the verified dates of fingerprint clearance, Department of Justice clearance and Tuberculosis Test clearance for all employees, approved subcontractors and/or volunteers prior to such individuals starting to work with any student.

CONTRACTOR shall monitor the status of licenses, credentials, certifications, permits and/or other documents for all individuals employed, contracted, and/or otherwise hired by CONTRACTOR. CONTRACTOR shall notify LEA and CDE in writing within forty-five (45) days when personnel changes occur which may affect the provision of special education and/or related services to LEA students. CONTRACTOR shall notify LEA within thirty (30) days if any such licenses, certifications or waivers are expired, suspended, revoked, rescinded, challenged pursuant to an administrative or legal complaint or lawsuit, or otherwise nullified during the effective period of this Master Contract. The LEA shall not be obligated to pay for any services provided by a person whose such licenses, certifications or waivers are expired, suspended, revoked, rescinded, or otherwise nullified during the period which such person is providing services under this Master Contract. Failure to notify the LEA and CDE of any changes in credentialing/licensed staff may result in suspension or revocation of CDE certification and/or suspension or termination of this Master Contract by the LEA.

47. STAFF ABSENCE

When CONTRACTOR is a NPA and/or related services provider, and CONTRACTOR's service provider is absent, CONTRACTOR shall provide a qualified (as defined in Section 7 of this agreement and as determined by LEA) substitute, unless LEA provides appropriate coverage in lieu of CONTRACTOR's service providers.

It is understood that the parent of a student shall not be deemed to be a qualified substitute for their student. LEA will not pay for services unless a qualified substitute is provided and/or CONTRACTOR provides documentation evidencing the provision of “make-up” services by a qualified service provider within forty-five (45) calendar days from the date on which the services should have been provided. CONTRACTOR shall not “bank” or “carry over” make up service hours under any circumstances, unless otherwise agreed to in writing by CONTRACTOR and authorized LEA representative. When CONTRACTOR is unable to participate in an IEP meeting, CONTRACTOR shall provide a qualified substitute for IEP participation if the student’s meeting is time sensitive and not able to be rescheduled, upon LEA request.

48. STAFF PROFESSIONAL BEHAVIOR WHEN PROVIDING SERVICES AT SCHOOL OR SCHOOL RELATED EVENTS OR AT SCHOOL FACILITY AND/OR IN THE HOME

It is understood that all employees, subcontractors, and volunteers of any certified NPS/A shall adhere to the customary professional and ethical standards when providing services. All practices shall only be within the scope of professional responsibility as defined in the professional code of conduct for each profession as well as any LEA professional standards as specified in Board policies and/or regulations when made available to the CONTRACTOR.

For services provided on a public school campus, sign in/out procedures shall be followed by NPS/A providers working in a public school classroom along with all other procedures for being on campus consistent with school and district policy. Such policies and procedures shall be made available to the CONTRACTOR upon request. It is understood that the public school credentialed classroom teacher is responsible for the instructional program.

CONTRACTOR providing services outside of the student’s school as specified in the IEP shall ensure that at least one parent of the child or an adult caregiver with written and signed authority to make decisions in an emergency is present during provision of services. The names of any adult caregiver other than the parent shall be provided to the LEA prior to the start of any home-based services, including written and signed authorization in emergency situations. The adult caregiver cannot also be an employee or volunteer associated with the NPS/NPA service provider. All problems and/or concerns reported by CONTRACTOR to parents or guardians, in either verbal or written form, shall be reported to the LEA.

HEALTH AND SAFETY MANDATES

49. HEALTH AND SAFETY

CONTRACTOR shall comply with all applicable federal, state, local, and LEA laws, regulations, ordinances, policies, and procedures regarding student and employee health and safety. CONTRACTOR shall comply with the requirements of California Education Code sections 35021 et. seq. and, 49406, regarding the examination of CONTRACTOR’s employees and volunteers for tuberculosis. CONTRACTOR shall provide to LEA documentation for each individual volunteering, employed, contracted, and/or otherwise hired by CONTRACTOR of such compliance before an individual comes in contact with a student.

CONTRACTOR shall comply with OSHA Blood-Borne Pathogens Standards, 29 Code of Federal Regulations (CFR) section 1910.1030, when providing medical treatment or assistance to a student.

CONTRACTOR further agrees to provide annual training regarding universal health care precautions and to post required notices in areas designated in the California Health and Safety Code.

50. FACILITIES AND FACILITIES MODIFICATIONS

CONTRACTOR shall provide special education and/or related services to students in facilities that comply with all applicable federal, state, and local laws, regulations, and ordinances related, but not limited to: disability access; fire, health, sanitation, and building standards and safety; fire warning systems; zoning permits; and occupancy capacity. When CONTRACTOR is a NPS, CONTRACTOR shall conduct fire drills as required by Title 5 California Code of Regulations section 550. CONTRACTOR shall be responsible for any structural changes and/or modifications to CONTRACTOR's facilities as required complying with applicable federal, state, and local laws, regulations, and ordinances. Failure to notify the LEA and CDE of any changes in, major modification or relocation of facilities may result in the suspension or revocation of CDE certification and/or suspension or termination of this Master Contract by the LEA.

51. ADMINISTRATION OF MEDICATION

CONTRACTOR shall comply with the requirements of California Education Code section 49422 et seq. when CONTRACTOR serves a student that is required to take prescription and/or over-the-counter medication during the school day. CONTRACTOR may designate personnel to assist the student with the administration of such medication after the student's parent(s) provide to CONTRACTOR: (a) a written statement from a physician detailing the type, administration method, amount, and time schedules by which such medication shall be taken; and (b) a written statement from the student's parent(s) granting CONTRACTOR permission to administer medication(s) as specified in the physician's statement. CONTRACTOR shall maintain, and provide to LEA upon request, copies of such written statements. CONTRACTOR shall maintain a written log for each student to whom medication is administered. Such written log shall specify the student's name; the type of medication; the date, time, and amount of each administration; and the name of CONTRACTOR's employee who administered the medication. CONTRACTOR maintains full responsibility for storing medications in a secure location and ensuring appropriate staff training in the administration of such medication consistent with physician's written orders. Any change in medication type, administration method, amount or schedule must be authorized by both a licensed physician and parent.

52. INCIDENT/ACCIDENT REPORTING

CONTRACTOR shall submit within 24 hours, electronically, any serious accident or incident report to the LEA. CONTRACTOR shall properly submit required accident or incident reports pursuant to the procedures specified in LEA Procedures.

53. CHILD ABUSE REPORTING

CONTRACTOR hereby agrees to annually train all staff members, including volunteers, so that they are familiar with and agree to adhere to its own child and dependent adult abuse reporting obligations and procedures as specified in California Penal Code section 11164 et seq. and Education Code 44691. To protect the privacy rights of all parties involved (i.e., reporter, child and alleged abuser), reports will remain confidential as required by law and professional ethical mandates. A written statement acknowledging the legal requirements of such reporting and verification of staff adherence to such reporting shall be submitted to the LEA.

54. SEXUAL AND GENDER IDENTITY HARASSMENT

CONTRACTOR shall have a Sexual and Gender Identity harassment policy that clearly describes the kinds of conduct that constitutes sexual harassment and that is prohibited by the CONTRACTOR's policy, as well as federal and state law. The policy should include procedures to make complaints without fear of retaliation, and for prompt and objective investigations of all sexual harassment complaints. CONTRACTOR further agrees to provide annual training to all employees regarding the laws concerning sexual harassment and related procedures pursuant to Government Code 12950.1.

55. REPORTING OF MISSING CHILDREN

CONTRACTOR assures LEA that all staff members, including volunteers, are familiar with and agree to adhere to requirements for reporting missing children as specified in California Education Code section 49370. A written statement acknowledging the legal requirements of such reporting and verification of staff adherence to such reporting shall be properly submitted to the LEA. The written statement shall be submitted as specified by the LEA.

FINANCIAL**56. ENROLLMENT, CONTRACTING, SERVICE TRACKING, ATTENDANCE REPORTING, AND BILLING PROCEDURES; EXHIBITS E, F, G & J**

CONTRACTOR shall assure that the nonpublic school or nonpublic agency has the necessary financial resources to provide an appropriate education for the students enrolled and will distribute those resources in such a manner to implement the IEP and ISA for each and every student.

CONTRACTOR shall comply with all LEA procedures concerning enrollment, contracting, attendance reporting, service tracking and billing including requirements of electronic billing as specified by the LEA Procedures, as well as provide all such records requested by LEA concerning the same. CONTRACTOR shall be paid for the provision of special education and/or related services specified in the student's IEP and ISA. All payments by LEA shall be made in accordance with the terms and conditions of this Master Contract and governed by all applicable federal and state laws.

CONTRACTOR shall maintain separate registers for the basic education program (EXHIBIT E or G), each related service, and services provided by instructional assistants, behavior intervention aides and bus aides (EXHIBIT F). The copies of attendance registers/service records and Invoice payment demand shall be submitted to LEA within thirty (30) days after the end of each attendance calendar month in which services are rendered, except in November, December, March, June, when attendance registers must be faxed or scanned and emailed to the LEA on the last school day of the month. Original attendance forms (i.e., roll books for the basic education program, service tracking documents and notes for instructional assistants, behavioral intervention aides, bus aides, and each related service) shall be completed by the actual service provider whose signature shall appear on such forms and shall be available for review, inspection, or audit by LEA during the effective period of this contract and for a period of five (5) years thereafter. CONTRACTOR shall verify the accuracy of minutes of reported attendance that is the basis of services being billed for payment.

CONTRACTOR shall submit invoices (EXHIBIT J) and related documents to LEA for payment, for each calendar month when education or related services were provided. Invoices and related documents shall be properly submitted electronically and in addition, on an LEA form with signatures in the manner prescribed by LEA. At a minimum, each invoice must contain the following information: month of service; specific days and times of services coordinated by the LEA approved calendar unless otherwise specified in the IEP or

agreed to by the LEA; name of staff who provided the service; approved cost of each invoice; total for each service and total for the monthly invoice; date invoice was mailed; signature of NPS/NPA administrator authorizing that the information is accurate and consistent with the ISA, CDE certificates and staff notification; verification that attendance report is attached as appropriate; indication of any made-up session consistent with this contract; verification that progress reports have been provided consistent with the ISA (monthly or quarterly unless specified otherwise on the ISA); and name or initials of each student for whom the service was provided.

In the event services were not provided, rationale for why the services were not provided shall be included.

Such an invoice is subject to all conditions of this contract. At the discretion of the LEA, an electronic invoice may be required provided such notice has been made in writing and training provided to the CONTRACTOR at no additional charge for such training.

Invoices shall be submitted no later than thirty (30) days after the end of the attendance accounting period in which the services were rendered. LEA shall make payment to CONTRACTOR based on the number of billable days of attendance and hours of service at rates specified in this contract within forty-five (45) days of LEA's receipt of properly submitted hard copy of invoices prepared and submitted as specified in California Education Code Section 56366.5 and the LEA. CONTRACTOR shall correct deficiencies and submit rebilling invoices no later than thirty (30) calendar days after the invoice is returned by LEA. LEA shall pay properly submitted re-billing invoices no later than forty-five (45) days after the date a completely corrected re-billing invoice is received by LEA.

Upon approval of said payment demand, LEA shall make payment in an amount equal to the number of creditable days of attendance multiplied by the agreed upon unit amount. Payment shall be made within forty-five (45) days of LEA's receipt of payment demand except when approval is denied and LEA exercises its right to withhold. Should the LEA or SCOE fail to comply, the nonpublic nonsectarian school or nonpublic agency may require the LEA, or county office to pay an additional amount of 1 1/2 percent of the unpaid balance per month until full payment is made.

In no case shall initial payment claim submission for any Master Contract fiscal year (July-June) extend beyond December 31st after the close of the fiscal year. In no case shall any rebilling for the Master Contract fiscal year (July- June) extend beyond six (6) months after the close of the fiscal year unless approved by the LEA to resolve billing issues including re-billing issues directly related to a delay in obtaining information from the Commission on Teacher Credentialing regarding teacher qualification, but no later than twelve (12) months from the close of the fiscal year. If the billing or re-billing error is the responsibility of the LEA, then no limit is set provided that the LEA and CONTRACTOR have communicated such concerns in writing during the 12-month period following the close of the fiscal year. ~~LEA will not pay mileage for NPA employee.~~ LEA will not pay mileage or drive time for NPA employee without prior written authorization from LEA or as specified on the ISA.

57. RIGHT TO WITHHOLD PAYMENT

LEA may withhold payment to CONTRACTOR when: (a) CONTRACTOR has failed to perform, in whole or in part, under the terms of this contract; (b) CONTRACTOR has billed for services rendered on days other than billable days of attendance or for days when student was not in attendance and/or did not receive services; (c) CONTRACTOR was overpaid by LEA as determined by inspection, review, and/or audit of its program, work, and/or records; (d) CONTRACTOR has failed to provide supporting documentation with an invoice, as required by EC 56366(c)(2); (e) education and/or related services are provided to students by personnel who are not appropriately credentialed, licensed, or otherwise qualified; (f) LEA has not received prior to school closure or contract termination, all documents concerning one or more students enrolled in

CONTRACTOR's educational program; (g) CONTRACTOR fails to confirm a student's change of residence to another district or confirms the change of residence to another district, but fails to notify LEA within five (5) days of such confirmation; or (h) CONTRACTOR receives payment from Medi-Cal or from any other agency or funding source for a service provided to a student. It is understood that no payments shall be made for any invoices that are not received by six (6) months following the close of the prior fiscal year, for services provided in that year.

Final payment to CONTRACTOR in connection with the cessation of operations and/or termination of a Master Contract will be subject to the same documentation standards described for all payment claims for regular ongoing operations. In addition, final payment may be withheld by the LEA until completion of a review or audit, if deemed necessary by the LEA. Such review or audit will be completed within ninety (90) days. The final payment may be adjusted to offset any previous payments to the CONTRACTOR determined to have been paid in error or in anticipation of correction of documentation deficiencies by the CONTRACTOR that remain uncorrected.

The amount which may be withheld by LEA with respect to each of the subparagraphs of the preceding paragraph are as follows: (a) the value of the service CONTRACTOR failed to perform; (b) the amount of overpayment; (c) the portion of the invoice for which satisfactory documentation has not been provided by CONTRACTOR; (d) the amount invoiced for services provided by the individual not appropriately credentialed, licensed, or otherwise qualified; (e) the proportionate amount of the invoice related to the applicable pupil for the time period from the date the violation occurred and until the violation is cured; or (f) the amount paid to CONTRACTOR by Medi-Cal or another agency or funding source for the service provided to the student.

If LEA determines that cause exists to withhold payment to CONTRACTOR, LEA shall, within ten (10) business days of this determination, provide to CONTRACTOR written notice that LEA is withholding payment. Such notice shall specify the basis or bases for LEA's withholding payment and the amount to be withheld. Within thirty (30) days from the date of receipt of such notice, CONTRACTOR shall take all necessary and appropriate action to correct the deficiencies that form the basis for LEA's withholding payment or submit a written request for extension of time to correct the deficiencies or submit to LEA written documentation demonstrating that the basis or bases cited by the LEA for withholding payment is unfounded. Upon receipt of CONTRACTOR's written request showing good cause, LEA shall extend CONTRACTOR's time to correct deficiencies (usually an additional thirty (30) days), otherwise payment will be denied.

If after subsequent request for payment has been denied and CONTRACTOR believes that payment should not be withheld, CONTRACTOR shall send written notice to LEA specifying the reason it believes payment should not be withheld. LEA shall respond to CONTRACTOR's notice within thirty (30) business days by indicating that a warrant for the amount of payment will be made or stating the reason LEA believes payment should not be made. If LEA fails to respond within thirty (30) business days or a dispute regarding the withholding of payment continues after the LEA's response to CONTRACTOR's notice, CONTRACTOR may invoke the following escalation policy.

After forty-five (45) business days: The CONTRACTOR may notify the Authorized LEA's Representative of the dispute in writing. The LEA Authorized Representative shall respond to the CONTRACTOR in writing within fifteen (15) business days.

After sixty (60) business days: The LEA or CONTRACTOR may appeal to the County Superintendent of Schools so long as the County Superintendent of Schools is not participating in the Local Plan involved in the NPS/A contract, or a mutually agreed upon mediator. Both parties agree to pay for their own costs and expenses arising out of such mediation. Each party agrees to act in good faith in participating in any mediation process agreed to by the parties.

58. PAYMENT FROM OUTSIDE AGENCIES

CONTRACTOR shall notify LEA when Medi-Cal or any other agency is billed for the costs associated with the provision of special education and/or related services to students. Upon request, CONTRACTOR shall provide to LEA any and all documentation regarding reports, billing, and/or payment by Medi-Cal or any other agency for the costs associated with the provision of special education and/or related services to students. CONTRACTOR shall provide prior written notice of the rights and protections required by Title 34 of the Code of Federal Regulations section 300.154(d) whenever it seeks to use the LEA students' public benefits to pay for special education and related services. Such notice shall be provided before seeking payment from Medi-Cal for the first time and annually.

59. PAYMENT FOR ABSENCES**NONPUBLIC SCHOOL STAFF ABSENCE**

Whenever a classroom teacher employed by CONTRACTOR is absent, CONTRACTOR shall provide an appropriately credentialed substitute teacher in the absent teacher's classroom in accordance with California Education Code section 56061. CONTRACTOR shall provide to LEA documentation of substitute coverage pursuant to the LEA Procedures. Substitute teachers shall remain with their assigned class during all instructional time. LEA will not pay for instruction and/or services unless said instruction or service is provided by an appropriately credentialed substitute teacher.

Whenever a related service provider is absent, CONTRACTOR shall provide a qualified (as defined in Section 7 of this agreement and as determined by LEA) substitute, or a make-up schedule as outlined in Section 6, paragraph three of this contract. LEA will not pay for services unless a qualified substitute is provided and/or CONTRACTOR provides documentation evidencing the provision of "make-up" services by a qualified service provider within forty-five (45) calendar days from the date on which the services should have been provided unless otherwise agreed in student's IEP.

NONPUBLIC SCHOOL STUDENT ABSENCE

If CONTRACTOR is a nonpublic school, no later than the tenth (10th) cumulative day of a student's unexcused absence, CONTRACTOR shall notify the LEA of such absence.

Excused Absence Method

- a) LEA shall not be responsible for payment for more than 8 cumulative days of absences, for each of the first ninety days and second ninety days of the school year (i.e., semester), unless a written time extension is granted by LEA. No more than three of the 8 cumulative absences shall be unexcused. Reimbursements for Related Services cannot be claimed except in the case of a Bundled tuition rate.
- b) On the 4th consecutive day of a pupil's absence, CONTRACTOR shall notify LEA of such absence. If CONTRACTOR fails to provide such notice by the 4th day of consecutive absence, CONTRACTOR shall not be compensated for services delivered during continuing absence after the 4th consecutive day of excused absence.

- c) All excused absences must be verified and a copy must be submitted to LEA with the monthly invoice. All documentation must be kept for at least five (5) years from the date of origination.

Excused Absence Method (Continued)

- d) Only the individuals listed below may verify the reason for absence:
- (1) School or public health nurse
 - (2) Physician
 - (3) Principal
 - (4) Teacher
 - (5) School employee assigned to make such verification
 - (6) Student eighteen years of age or over
 - (7) Parent
- e) Any reasonable method which established the reason for the absence may be used:
- (1) Written note from parent, guardian, representative or adult pupil (over 18 or emancipated)
 - (2) Telephone conversation with parent, guardian, representative, or adult pupil (over 18 or emancipated)
- f) Standards for excused absences are defined in the education code. Contractor is responsible for verification of excused absence in accordance with current requirements.

Criteria for a billable day for payment purposes is one (1) day of attendance as defined in California Education Code, sections 46010, 46010.3 and 46307. LEA shall not pay for services provided on days that a student's attendance does not qualify for Average Daily Attendance (ADA) reimbursement under state law. Per Diem rates for students whose IEPs authorize less than a full instructional day may be adjusted on a pro rata basis in accordance with the actual proportion of the school day the student was served. LEA shall not be responsible for payment of related services for days on which a student's attendance does not qualify for Average Daily Attendance ("ADA") reimbursement under state law, nor shall student be eligible for make-up services.

For student absences beginning on the first day of quarantine or isolation consistent with public health protocol, when student's symptoms allow for participation in instruction, CONTRACTOR shall receive payment consistent with the student's approved ISA, contingent upon the provision of agreed upon services consistent with the Emergency Circumstances documented in the pupil's IEP in accordance with Education Code section 56345(a)(9). In the event that a student's symptoms do not allow participation in instruction, they shall be considered absent due to illness.

NONPUBLIC AGENCY STAFF ABSENCE

When CONTRACTOR is a nonpublic agency and CONTRACTOR's service provider is absent, CONTRACTOR shall provide a qualified (as defined in Section 7 of this agreement and as determined by LEA) substitute, unless LEA provides appropriate coverage in lieu of CONTRACTOR's service providers. LEA shall not pay for services unless a qualified substitute is provided and/or CONTRACTOR provides

documentation evidencing the provision of “make-up” services by a qualified service provider within forty-five (45) calendar days from the date on which the services should have been provided. CONTRACTOR shall not “bank” or “carry over” make up service hours under any circumstances, unless otherwise agreed to in writing by CONTRACTOR and LEA. In the event services were not provided, reasons for why the services were not provided shall be included. When CONTRACTOR is unable to participate in an IEP meeting, LEA may request that CONTRACTOR provide a qualified substitute for IEP participation if the student’s meeting is time sensitive and not able to be rescheduled.

NONPUBLIC AGENCY STUDENT ABSENCE

~~If CONTRACTOR is a nonpublic agency, it shall notify LEA of the absence of a student no later than the fifth (5th) consecutive service day of the student’s absence. LEA shall not be responsible for the payment of services when a student is absent.~~

If CONTRACTOR is a nonpublic agency, it shall notify LEA of the absence of a student no later than 24 business hours following each student’s absence. LEA shall not be responsible for the payment of services when a student is absent and reasonable advance notice was given. When a parent/guardian fails to cancel an appointment less than 24 hours in advance, LEA shall be responsible for payment at 50% of the established rate based on the scheduled duration of the service. Student absences will NOT be made-up.

60. LEA and/or NONPUBLIC SCHOOL CLOSURE DUE TO EMERGENCY

The following shall apply in the event of an NPS school closure due to an emergency consistent with guidelines followed by LEAs under Education Code sections 41422 and 46392:

- a) If CONTRACTOR remains open during an emergency and serves students appropriately as delineated in the ISA, CONTRACTOR shall receive payment, regardless of whether a sending LEA is open or closed.
- b) In the event of a NPS School Closure for the reasons set forth in Education Code section 41422, if the LEA is able to obtain alternative placement for the student, CONTRACTOR shall not receive payment for days the student is not in attendance due to CONTRACTOR’s school closure. If the LEA is unable to obtain alternative placement CONTRACTOR shall receive payment consistent with the student’s approved ISA, contingent upon the provision of agreed upon services consistent with the Emergency Circumstances documented in the pupil’s IEP in accordance with Education Code section 56345(a)(9).
- c) LEA and NPS School Closure- In the event of the LEA and NPS School Closures, on days the LEA is funded, CONTRACTOR shall receive payment consistent with the student’s approved ISA, until an alternative placement can be found and implement LEA student IEP in accordance with Education Code section 56345(a)(9) pertaining to emergency conditions. If the LEA is able to obtain alternative placement for the student, CONTRACTOR shall not receive payment for days the student is not in attendance with CONTRACTOR due to CONTRACTOR’S school closure.

When the emergency school closure is lifted, CONTRACTOR shall notify the LEAs it serves of any lost instructional minutes. CONTRACTOR and LEAs shall work collaboratively to determine the need for make up days or service changes, and shall work together to amend IEP and ISA paperwork as appropriate.

61. INSPECTION AND AUDIT

The CONTRACTOR shall maintain and the LEA shall have the right to examine and audit all of the books, records, documents, accounting procedures and practices and other evidence that reflect all costs claimed to have been incurred or fees claimed to have been earned under this Agreement.

CONTRACTOR shall provide access to LEA to all records including, but not limited to: student records as defined by California Education Code section 49061(b); registers and roll books of teachers; daily service logs and notes or other documents used to record the provision of related services; Medi-Cal/daily service logs and notes used to record provision of services provided by instructional assistants, behavior intervention aides, bus aides, and supervisors; absence verification records (parent/doctor notes, telephone logs, and related documents); bus rosters; staff lists specifying credentials held, business licenses held, documents evidencing other qualifications, , dates of hire, and dates of termination; staff time sheets; non-paid staff and volunteer sign-in sheets; transportation and other related service subcontracts; school calendars; bell/class schedules when applicable; liability and worker's compensation insurance policies; state NPS/A certifications; by-laws; lists of current board of directors/trustees, if incorporated; other documents evidencing financial expenditures; federal/state payroll quarterly reports Form 941/DE3DP; and bank statements and canceled checks or facsimile thereof. Such access shall include unannounced inspections by LEA. CONTRACTOR shall make available to LEA all budgetary information including operating budgets submitted by CONTRACTOR to LEA for the relevant contract period being audited.

CONTRACTOR shall make all records available at the office of LEA or CONTRACTOR's offices (to be specified by LEA) at all reasonable times and without charge. All records shall be provided to LEA within five (5) working days of a written request from LEA. CONTRACTOR shall, at no cost to LEA, provide assistance for such examination or audit. LEA's rights under this section shall also include access to CONTRACTOR's offices for purposes of interviewing CONTRACTOR's employees. If any document or evidence is stored in an electronic form, a hard copy shall be made available to the LEA, unless the LEA agrees to the use of the electronic format.

CONTRACTOR shall obtain from its subcontractors and suppliers written agreements to the requirements of this section and shall provide a copy of such agreements to LEA upon request by LEA.

If an inspection, review, or audit by LEA, a state agency, a federal agency, and/or an independent agency/firm determines that CONTRACTOR owes LEA monies as a result of CONTRACTOR's over billing or failure to perform, in whole or in part, any of its obligations under this Master Contract, LEA shall provide to CONTRACTOR written notice demanding payment from CONTRACTOR and specifying the basis or bases for such demand. Unless CONTRACTOR and LEA otherwise agree in writing, CONTRACTOR shall pay to LEA the full amount owed as a result of CONTRACTOR's over billing and/or failure to perform, in whole or in part, any of its obligations under this Master Contract, as determined by an inspection, review, or audit by LEA, a state agency, a federal agency, and/or an independent agency/firm. CONTRACTOR shall make such payment to LEA within thirty (30) days of receipt of LEA's written notice demanding payment.

62. RATE SCHEDULE; EXHIBIT A

The attached rate schedule (EXHIBIT A) limits the number of students that may be enrolled and maximum dollar amount of the contract. It may also limit the maximum number of students that can be provided specific services. Per Diem rates for students whose IEPs authorize less than a full instructional day may be adjusted proportionally. In such cases only, the adjustments in basic education rate shall be based on the required minimum number of minutes per grade level as set forth in paragraph 23, above, and in California Education Code Section 46200-46208.

Special education and/or related services offered by CONTRACTOR shall be provided by qualified personnel

as per State and Federal law, and the codes and charges for such educational and/or related services during the term of this contract, shall be as stated in Exhibit A.

63. DEBARMENT CERTIFICATION

By signing this agreement, the CONTRACTOR certifies that:

(a) The CONTRACTOR and any of its shareholders, partners, or executive officers are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency, and

(b) Have not, within a three-year period preceding this contract, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a Federal, state or local government contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and are not presently indicted for, or otherwise criminally or civilly charged by a Government entity with, commission of any of these offenses.

CONTRACT SIGNATURE PAGE:

64. EXECUTION OF CONTRACT

During the term of this Contract, CONTRACTOR shall provide special education and DIS in accordance with Individual Service Agreements (**EXHIBIT B**) executed by CONTRACTOR and **SELPA Member Districts LEA** at the rate shown on the attached rate sheet (**EXHIBIT A**).

Daily Program Rates for pupils whose individual education program (IEP) authorizes less than a full instructional day shall be reduced proportionately (pupil’s instructional day in minutes/minutes in full instructional day) x Daily Program Rate as shown on the attached **Rate Schedule Exhibit A**, unless otherwise specified in ISA.

This Contract includes the attached General Provisions, **Exhibits A, B & E (all other Exhibits are available upon request)** and any ISAs executed by CONTRACTOR and **SELPA Member Districts-LEA** -No payment shall be due under this Contract for special education or DIS provided to any pupil unless and until a **SELPA member district LEA** and CONTRACTOR execute an ISA for such pupil.

Date: _____ Date: _____

Signature: _____ Signature: _____

Name of LEA Administrator

Name of NPS/A Administrator

Administrator’s Title

Name of NPS/A Title

LEA Address

NPS/A Address

LEA City, State, Zip

NPS/A City, State, Zip

LEA Phone

NPS/A Phone

Contract Submittal Requirements

- 1.) Please sign and return original contract with the following documents by **: Enter date**
- 2) Description of any changes to the crisis intervention training, including restraint procedures, or a statement that they have not changed (Section 30).
- 3) EXHIBIT C, Current Staff List with annual training data.
- 4) EXHIBIT A, rate schedule, with initials.

Return contract with original signature and above documents to:

Name of Contract Contact:

Name of Contract Contact

Contract Contact’s Title:

Contact’s Title

Contract Contact’s Phone:

Contact’s Phone

Address for Contract Submission:

Address

City, State, Zip

Coversheet

Consent - Personnel Services

Section: XI. Consent
Item: C. Consent - Personnel Services
Purpose:
Submitted by:
Related Material: Support Counselor -2023_2024.pdf
Employee Handbook 2023 - 2024 EACS.pdf
EACS_2023-24_Teacher of Record Manual Revisions.pdf
Teacher of Record Manual-_23_24.pdf
Travel Manual (4).pdf
REDLINE Travel Manual.pdf

BACKGROUND:

Item: Approval of the Excel Academy Charter School Employee Handbook Revisions 2023-2024

Background: The Excel Academy Charter School employee handbook was updated to reflect changes in the classified staff vacation accrual timeline.

Item: Approval of Teacher of Record (ToR) Training Manual 2023-2024

Background: Edits were made to the ToR Manual to reflect recent changes, updates, and clarification in wording.

Item: Approval of the EACS Travel Manual Revisions

Background: The EACS Travel Manual was revised to update the per diem amounts for staff, to reflect the rising inflation. Edits were also made to the conference logistics to clarify the location of the main conferences attended by leadership.



Support Counselor

Job Description

Reports To:	Elementary Principal
FLSA Status:	Non-Exempt
School Classification:	Certificated
Pay Range:	Certificated Pupil Support Salary Schedule
Work Schedule:	11 Months
Location:	Remote Office

POSITION SUMMARY:

The Support Counselor provides direct support to teachers, parents, and students so that they will maintain mental wellness in order to successfully and confidently navigate their academic journey at Excel Academy. The Support Counselor will support the Elementary departments in delivering social and emotional learning programming to students along with creating exposure opportunities to future career and education options. This individual will provide counseling as assigned, while supporting the crisis team and monthly initiatives.

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.

Qualifications:

- Bachelor's Degree
- PPS Credential
- Two (2) years directly related experience is preferred
- Hold and maintain a valid California Driver's License; proof of automobile insurance; and full time use of a dependable automobile that is insured pursuant to California regulations.

State and Federally Mandated Qualifications:

- A valid, current, and appropriate California state teaching credential for teaching staff. A copy of Teaching Credential to be provided and kept current
- State and federal background clearance (LiveScan) to work with students (Education Code Section 44237). No prospective employee can report to work without this clearance being received and Human Resources notifying the immediate supervisor of this clearance.
- Proof of a clear TB test dated within the last 60 days (Education Code Section 49406) upon employment and thereafter updated every four years.

ESSENTIAL DUTIES and RESPONSIBILITIES:

- Provides and guides weekly Social and Emotional Learning (SEL) support classes for students K-6 and teachers when applicable.
- Attends SSTs, 504s, and IEPs upon request.
- Provides 1:1 counseling when assigned.
- Provides workshops to support trending issues in student populations (ie: text anxiety, social anxiety, organizational skills etc...)
- Create and distribute at home materials and activities parents can participate in with students that correspond with the monthly issue initiatives (ie: Suicide Prevention Month in september, Red Ribbon Week in October etc...)
- Provide parent education on trending topics and monthly initiatives.
- Assists in preparing and educating parents and students for the requirements of higher education and High School pathways available through Excel Academy.
- Assists with and coordinates meetings for students who are not meeting the attendance requirements of the school; creates support tools specifically for students who are not meeting the attendance requirements of the school to be shared at the meetings.
- Develops Elementary level college and career readiness exposure campaigns.
- Develops, communicates, and implements the vision for the guidance department that aligns with the school's vision and priorities.
- In collaboration with the Secondary School Counseling Department, develops a year-long college and career exposure student support plan. This includes but is not limited to hosting workshops, training teachers, creating and posting flyers, and maintaining a college and career online presence.
- Attends and participates in weekly office hours and regular department meetings

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 2 business days.
- Represent the school at community events.
- Supports testing sites as needed during the testing season
- Attend professional development

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 25 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

2023-2024



EMPLOYEE
HANDBOOK



1 Technology
i-811
Irvine, CA
92618

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Welcome!

We are thrilled to welcome you to Excel Academy Charter School! You are joining a team of dedicated, award winning educators and loyal, hard working support staff! As a school we seek to hire and retain high caliber individuals to meet our vision of extraordinary education.

We truly value our employees and have developed this Employee Handbook (handbook) to assist you with understanding our policies, procedures, and performance expectations. As the employee you are responsible for reading and understanding the handbook as well as any posted revisions. If you have any questions or need clarification please don't hesitate to reach out to our HR specialist Megan Anderson or designated HR or payroll staff. Our goal is that you take pride in your role at Excel Academy as you play an instrumental role in the life of a student and their family. We sincerely hope that you will find your employment here at Excel Academy Charter School to be one of enrichment, collaboration, and an overall professionally rewarding experience.

Best wishes for a wonderful school year!

The Excel Academy Leadership Team

Right to Revise

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

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

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

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

At-Will Employment Status

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

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

Section I: Nondiscrimination Policies

A. Equal Employment Opportunity

The School is an equal opportunity employer and makes employment decisions on the basis of merit. Selections for employment focus on the candidates whose training and experience most closely align with the position requirements, and fit with the School's mission, vision, and values. School policy prohibits unlawful discrimination based on actual or perceived race (including traits historically associated with race, including, but not limited to, hair texture and protective hairstyles such as braids, locks and twists), color, creed, actual or perceived gender (including gender identity and gender expression), religion (all aspects of religious beliefs, observance or practice, including religious dress or grooming practices), marital status, registered domestic partner status, status as a victim of domestic violence, assault or stalking, age (40 and over), ethnicity, national origin or ancestry (including language use restrictions), citizenship, physical, intellectual or mental disability (including HIV and AIDS), medical condition (including cancer or a record or history of cancer, and genetic characteristics), family or medical leave status, sex (including pregnancy, childbirth, breastfeeding or a related medical condition), genetic information, sexual orientation, political affiliation, military and veteran status or any other consideration made unlawful by federal, state, or local laws. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.

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

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

The School will continually strive to recruit and retain highly qualified employees and remain a competitive public school employer, including examining employee evaluation

and compensation, and discipline/dismissal practices annually.

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

Megan Anderson

Assistant Director of Human Resources

Excel Academy Charter Schools

1 Technology Drive I-811

Irvine, CA 92618

manderson@excelacademy.education

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

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

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

B. Disability Accommodation

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

Any applicant or employee who requires an accommodation in order to perform the essential functions of the job as outlined in the applicable job description should contact the HR department and discuss the need for an accommodation. The School will engage

in an interactive process with the employee to identify possible accommodations, if any, which will help the applicant or employee perform the job. The School will implement reasonable accommodations that do not impose undue hardship.

C. Anti-Harassment

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

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

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

1. Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations or comments;
2. Visual displays such as derogatory and/or sexually-oriented posters, photography, cartoons, drawings or gestures;
3. Physical conduct including assault, unwanted touching, intentionally blocking normal movement or interfering with work because of sex, race or any other protected basis;
4. Threats and demands to submit to sexual requests as a condition of continued

- employment, or to avoid some other loss and offers of employment benefits in return for sexual favors;
5. Retaliation for reporting or threatening to report harassment; and
 6. Communication via electronic media of any type that includes any conduct that is prohibited by state and/or federal law, or by the School policy.

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

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

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

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

1. Sexual Harassment

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

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

1. Submission to the conduct is explicitly or implicitly made a term or a condition of an individual's academic status, employment, or progress.
2. Submission to, or rejection of, the conduct by an individual is used as the basis for academic or employment decisions affecting the individual.
3. The conduct has the purpose or effect of having a negative impact upon the individual's academic performance, work, or progress or has the purpose or effect

of creating an intimidating, hostile, or offensive educational or working environment. The conduct is sufficiently severe, persistent, pervasive or objectively offensive, so as to create a hostile or abusive educational or working environment or to limit the individual's ability to participate in or benefit from an education program or activity.

4. Submission to, or rejection of, the conduct by the individual is used as the basis for any decision affecting the individual regarding benefits and services, honors, programs, or activities available at or through the local agency.

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

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

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

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

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

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

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

Managers and supervisors are to ensure that no such intimidation or harmful atmosphere of unwelcome sexual overtones exist in their workplaces. Every effort should be made to sensitize themselves and their employees to the differences between purely social overtones and those intended to affect working conditions. Also, employees are responsible for respecting the rights of their co-workers. Any employee who feels they have been harassed or retaliated against, or has knowledge of any incident of harassment or retaliation on any protected basis shall immediately report such incidents to their

immediate supervisor, HR, the Executive Director or the Title IX Coordinator and Coordinator for Nondiscrimination in Employment. If the supervisor is the harasser or has not responded to the complaint, or if not an employee, then the complainant should complain to any administrator without fear of reprisal. Employees may also report instances of sexual harassment through the School's Uniform Complaint Procedure without fear of reprisal.

2. Reporting

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

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

3. Investigation/Complaint Procedure

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

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

a. Informal Procedure

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

b. Formal Procedure

As noted above, individuals who believe they have been the victims of conduct prohibited by this policy statement or believe they have witnessed such conduct should discuss their concerns with their supervisor or the HR department. The School encourages the prompt reporting of complaints or concerns so that rapid and constructive action can be taken before relationships become irreparably strained. Therefore, while no fixed reporting period has been established, early reporting and intervention have proven to be the most effective method of resolving actual or perceived incidents of harassment. Any reported allegations of harassment, discrimination or retaliation will be investigated promptly and thoroughly. The investigation may include individual interviews with the parties involved and, where necessary, with individuals who may have observed the alleged conduct or may have other relevant knowledge. Confidentiality will be maintained throughout the investigation process to the extent consistent with adequate investigation and appropriate corrective action. Misconduct constituting harassment, discrimination or retaliation will be dealt with appropriately. Responsive action may include, training, referral to counseling and/or disciplinary action such as warning, reprimand, withholding of a promotion or pay increase, reassignment, temporary suspension without pay or termination, as the School believes appropriate under the circumstances.

4. Retaliation

Employees will not be retaliated against for complaining or participating in an investigation. Retaliation against an individual for reporting harassment or discrimination or for participating in an investigation of a claim of harassment or discrimination is a serious violation of this policy and, like harassment or discrimination itself, will be subject to disciplinary action. Acts of retaliation should be reported immediately and will be promptly investigated and addressed.

5. Conclusion

This policy was developed to ensure that all employees can work in an environment free from harassment, discrimination and retaliation. The School will make every reasonable effort to ensure that all concerned are familiar with these policies and aware that any complaint in violation of such policies will be investigated and resolved appropriately. Any employee who has any questions or concerns about these policies should talk with their supervisor or the HR department. Finally, these policies should not, and may not, be used as a basis for excluding or separating individuals of a particular gender, or any other protected characteristic, from participating in business or work-related social activities or discussions. In other words, no one should make the mistake of engaging in discrimination or exclusion in order to avoid allegations of harassment. The law and the policies of the School prohibit disparate treatment on the basis of sex or any other protected characteristic, with regard to terms, conditions, privileges and prerequisites of employment. The prohibitions against harassment, discrimination and retaliation are intended to complement and further those policies, not to form the basis of an exception to them.

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

D. Diversity Policy

The School is committed to fostering, cultivating and preserving a culture of diversity and inclusion.

Our staff is the most valuable asset we have. The collective sum of the individual differences, life experiences, knowledge, inventiveness, innovation, self-expression, unique capabilities and talent that our employees invest in their work represents a significant part of not only the School's culture, but its reputation and achievement as well.

We embrace and encourage our employees' differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status, and other characteristics that make our employees unique.

The School's diversity initiatives are applicable—but not limited—to our practices and policies on recruitment and selection; compensation and benefits; professional development and training; promotions; terminations; and the ongoing development of a work environment built on the premise of gender and diversity equity that encourages and enforces:

- Respectful communication and cooperation between all employees.
- Teamwork and employee participation, permitting the representation of all groups and employee perspectives.
- Work/life balance through flexible work schedules to accommodate employees' varying needs.
- Employer and employee contributions to the communities we serve to promote a greater understanding and respect for diversity.

All employees of the School have a responsibility to treat others with dignity and respect at all times. All employees are expected to exhibit conduct that reflects inclusion during work, at work functions on or off the work site, and at all other school-sponsored and participative events.

Any employee found to have exhibited any inappropriate conduct or behavior against others may be subject to disciplinary action up to termination.

Employees who believe they have been subjected to any kind of discrimination that conflicts with the School's diversity policy and initiatives should seek assistance from an HR representative.

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Section II: Employment Requirements

A. Child Abuse and Neglect Reporting

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

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

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

1. Sexual abuse: Sexual abuse means, in general, sexual assault or sexual exploitation. Sexual abuse does not include children who voluntarily engage in sexual activity with children of a similar age. Pregnancy of a minor does not, in and of itself, constitute suspicion of child abuse.
2. Neglect: Neglect occurs when a child’s custodian has failed to provide adequate “food, clothing, shelter, medical care, or supervision” that may or may not have resulted in any physical injury.
3. Unlawful corporal punishment: Unlawful corporal punishment occurs when any person willfully harms or injures a child to such a degree that results in a traumatic condition.
4. Willful cruelty or unjustifiable punishment: Child abuse also includes the situation where any “person willfully causes or permits any child to suffer unjustifiable pain or mental suffering” or when any person endangers a child’s health.

Confidentiality

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

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

Failure to Report

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

B. Employee Access to Confidential Information

Each employee is responsible for safeguarding confidential information obtained during employment. In the course of the employee’s work, the employee may have access to

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

Please note the release of unauthorized confidential information may result in immediate dismissal and the filing of criminal charges. Confidentiality of student information is a requirement of the law and great care must be taken to ensure it is protected. No student information will be released without the specific authorization of the CEO or designee. Employee information may be released as part of a Public Records Act request, for the purpose of employment verification with prior written approval by the employee, or as required by law.

C. Student Data/FERPA

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

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

D. Conflict of Interest

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

1. Personal Financial Interest

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

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

(2) “Financially interested” shall mean any contract with an individual, entity, or company in which any such person related by blood, marriage or civil partner, any other person with a close personal relationship to any such person who has an ownership interest, an investment interest, or a familial interest, and encompasses any situation where any such person's official judgment may be influenced by personal consideration or expectation of financial gain or any compensation or consideration of any kind other than that officially provided to any such person by the School.

2. Statement of Economic Interest (Form 700)

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

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

3. Personal Relationship

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

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

E. Anti-Nepotism Policy

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

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

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

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

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

F. Employment Eligibility Verification Document

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

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

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

G. Fingerprinting

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

H. Criminal Background Checks

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

I. Employment Application/Data

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

J. Employment Verifications

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

K. Certification and Licensing

Teachers are required to hold a current California Commission on Teacher Credentialing certificate, permit, or other commission approved document for the assignment held (“Certificated Employee”). In addition teachers must possess the proper EL authorization.

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

L. Mandatory Tuberculosis Testing

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

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

[See also Board Policy 4013]

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Section III: Standards of Conduct

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

A. Freedom from Violence

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

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

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

gatherings are safe and secure to the extent possible and to properly handle access to school facilities by the public, off-duty employees, and former employees.

The School will not tolerate any type of workplace violence committed by or against its employees. Employees who violate this policy will be subject to disciplinary action, up to and including discharge. Prohibited conduct includes, but is not limited to:

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

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

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

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

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

B. Prohibited Conduct

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

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

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

- hours to the extent that it interferes with the performance expectations of the assignment, except in cases of emergency or extreme circumstances;
22. Working overtime without authorization or refusing to work assigned overtime;
 23. Violation of dress standards;
 24. Violating any safety, health, security or School policy, rule, procedure or violation of the School's drug and alcohol policy;
 25. Committing a fraudulent act or a breach of trust under any circumstances;
 26. Committing or involvement in any act of unlawful harassment of another individual;
 27. Failing to promptly report work-related injury or illness;
 28. Any other action or behavior, which could harm the School's, parents', or students' interest.

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

C. Physical Contact with Students and Other Staff Members

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

The following forms of touching are never appropriate:

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

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

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

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

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

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

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

D. Off-duty Conduct

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

E. Drug and Alcohol Free Workplace and Awareness Program

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

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

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

The School will provide information to employees about:

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

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

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

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

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

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

F. Tobacco Free Workplace

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

G. Punctuality and Attendance

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

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

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

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

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

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

H. Professionalism

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

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

1. Communicating regularly.
2. Acting competently and dealing with others in a courteous and respectful manner.
3. Communicating pleasantly and respectfully with others at all times.

4. Following up on requests and questions promptly, providing professional replies to inquiries and requests.
5. Responding to email and voicemail within 24 business hours, or within a reasonable period of time depending on the assignment (employees should discuss this with their supervisor).
6. Taking pride in performing duties in an exceptional manner.

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

I. Dress Code

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

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

Employee dress is described as business casual, which includes:

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

Inappropriate attire:

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

Overall grooming – Grooming standards for everyone includes the appearance of care and proper hygiene. Hair, makeup, and jewelry may not interfere with an employee's ability to perform the job duties or pose a safety issue. Facial piercings should be

removed and tattoos should be covered during work hours. Excessive piercings or offensive tattoos may prohibit an individual from being considered for a customer facing assignment. The School reserves the right to ask any employee to cover inappropriate tattoos or remove any piercings that are not reflective of the school culture.

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

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

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

J. Gifts to Employees

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

K. Fee and Cash Collection

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

L. Building Security

Building security is the responsibility of all staff. The last employee, or a designated employee, who leaves the office at the end of the business day assumes the responsibility

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

Initial_____

Section IV: Personnel Policies and Procedures

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

A. New Employee Orientation

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

B. Employee Status

Employees may include exempt, nonexempt, regular full-time, regular part-time, and seasonal persons employed with the School who are subject to the control and direction of the School in the performance of their duties.

- Exempt: Employees whose positions meet specific criteria established by the Fair Labor Standards Act (FLSA) and who are exempt from overtime pay requirements.
- Nonexempt: Employees whose positions do not meet FLSA criteria and who are paid one and one-half their regular rate of pay for hours worked in excess of 40 hours per week. Nonexempt employees are also subject to meal period and rest break regulations.
- Regular full-time: Employees who are regularly scheduled to work 30 or more hours per week. Generally, full time employees are eligible for the School benefit package, subject to the terms, conditions, and limitations of each benefit program. Full-time status will be evaluated on a monthly basis.

- A full time TOR is expected to work at least six (6) hours per day, for 185 work days, for a minimum of 1,110 hours per year.

Employee Status	Exempt Certificated and Classified (FTE)	NonExempt Classified (Hours per Week)
Regular Full Time	.75+ FTE	30+ hours
Regular Part Time	.50 - .74 FTE	20-29 hours
Non-Regular	.49 FTE or less	19 hours or less

Student Counts

The teacher may indicate their desired student count with the School as a request, however, the needs of the School will determine the number of students assigned to the teacher.

C. Job Duties

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

D. Nonexempt Employees

1. Work Schedules

Business hours of school sites and offices (if any) shall be established by the CEO or designee. The CEO or designee will assign the classified staff’s individual work schedule to ensure staffing throughout the workday. Employees are expected to be at their desks or workstations at the start of their scheduled shifts, ready to work.

For the purposes of pay and leave accrual calculations, full-time for classified employees, is defined as 2,080 working hours. Work schedule exchanges will be reviewed on a case

by case basis as long as the exchange does not interfere with normal operations or result in excessive overtime. Exchanging work schedules with other employees may be authorized by the supervisor or their designee when necessary.

2. Rest Breaks and Meal Periods

a. Rest Breaks

Rest breaks are on the clock and duty-free. Employees are expected to return to work promptly at the end of any rest breaks.

b. Number of Rest Breaks

Nonexempt employees are provided one (1) paid ten-minute rest break for every four (4) hours worked (or major fraction thereof, which is defined as any amount of time over two (2) hours). A rest break is not authorized for employees whose total daily work time is less than three and one half (3.5) hours.

If the employee works a shift from three and one-half (3.5) to six (6) hours in length, they will be entitled to one (1) paid ten-minute rest break. If they work more than six (6) hours and up to 10 hours, they will be entitled to two (2) paid ten-minute rest breaks. If the employee works more than 10 hours and up to 14 hours, they will be entitled to three (3) paid ten-minute rest breaks.

c. Timing of Rest Breaks

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

d. Meal Period

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

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

e. Timing of Meal Period

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

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

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

f. Second Meal Period

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

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

g. Timing of Second Meal Period

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

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

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

h. Recording Meal Periods

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

reported on the time record.

i. Missed Rest Breaks and Meal Periods

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

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

Please also refer to the School's Timekeeping Policy.

3. Timekeeping

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

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

4. Pay for Mandatory Meetings/Training

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

5. Overtime

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

Compensation for hours in excess of 40 hours for the workweek, or in excess of eight (8) hours and not more than 12 hours for the workday, and for the first eight hours on the seventh consecutive day of work in one workweek, shall be paid at a rate of one-and-one-half times the employee's regular rate of pay. Compensation for hours in excess of 12 hours in one workday and in excess of eight (8) hours on the seventh consecutive workday in a workweek shall be paid at double the regular rate of pay.

E. Exempt Employees

The School will pay exempt employees a salary rather than by the hour. Once an employee's sick days have been exhausted or are otherwise unavailable, the School will deduct pay from an exempt employee's salary under the following circumstances: (i) one or more full days absences for personal reasons; (ii) one or more full day absences for illness, injury, or sickness, (iii) one or more full work weeks disciplinary suspensions; and (iv) partial (for intermittent leave) or full day absences during an approved family or medical leave in accordance with law. Exempt employees who believe that the School made an incorrect or improper salary deduction should promptly report the deduction to their supervisor or the HR department. If the School incorrectly or improperly made a deduction from an exempt employee's salary, it will reimburse the employee for the deducted pay as soon as possible.

F. Salary Overpayments

Because the School receives public funds, the School is obligated by law to seek reimbursement for any salary overpayment and cannot waive the recovery of the overpayment. Employees who receive excess pay as a result of a payroll error are required to return the funds to the School. The School will provide the employee with the correct salary calculation and the amount that is owed to the School. The employee may return the overpayment in full through a cashier's check or money order or allow the School to deduct the overpayment from the next paycheck. The School may arrange for a repayment plan that is mutually agreeable to both the School and the employee and does not exceed one calendar year from the date of the overpayment. Should an employee resign prior to completing the repayment, the full amount shall become due upon termination. A repayment plan may be offered to a terminated employee not to exceed

three (3) months in duration.

G. Employee Evaluation

Supervisors will conduct performance reviews with all regular full-time and regular part-time employees semi-annually and annually. Supervisors may conduct informal performance reviews and goal setting sessions more often if they choose.

Performance reviews are designed for the supervisor and the employee to discuss their current job tasks, encourage and recognize attributes, and discuss positive, purposeful approaches for meeting work-related goals. Together, the employee and supervisor will discuss ways in which the employee can accomplish goals and/or learn new skills.

Performance review and goal setting sessions may or may not have a direct effect on any changes in salary compensation. For this reason, among others, it is important to prepare for these reviews carefully, and participate in them fully.

Additional details on employee evaluations will be provided by Human Resources upon hire.

H. Corrective Action

All employees are expected to meet School standards of work performance. Work performance encompasses many factors, including attendance, punctuality, personal conduct, job proficiency and general compliance with School policies and procedures. If an employee does not meet these standards, the School may or may not, at its sole discretion, take corrective action, other than immediate dismissal. Employees have no entitlement to corrective action or progressive discipline prior to dismissal.

The intent of corrective action is to formally document problems while providing the employee with a reasonable time within which to improve performance. The School holds each of its employees to certain work rules and standards of conduct. When an employee deviates from these rules and standards, the employee may be terminated, or, at the School's discretion, be subject to corrective action by a supervisor.

Corrective actions may include, but are not required to include, an oral warning, a written warning, probation, suspension, and termination of employment. In deciding which initial corrective action would be appropriate, a supervisor may consider the seriousness of the infraction, the circumstances surrounding the matter, and the employee's previous record. As an at-will employer, the School may use all, some or none of the corrective actions described and will handle corrective action based on its own discretion.

Though the School will try to find paths for improvement whenever possible, the School considers certain rule infractions and violations of standards as grounds for immediate termination of employment. These include but are not limited to: theft in any form, insubordinate behavior, any misconduct concerning a child/student, vandalism or destruction of School property, trespassing, the use of School equipment without prior authorization, untruthfulness about personal work history, skills, or training, divulging proprietary information, and misrepresentations of the School to another employee, a prospective employee, or the general public.

Nothing in this section or any other section alters an employee's status as an at-will employee who may be terminated, with or without cause and with or without advance notice at any time by the School. Nothing in this section is intended to interfere with an employee's rights to communicate or voice concerns that are protected by Federal and State law.

I. Procedure for Disciplinary Action

The corrective action process is designed to encourage development by providing employees with guidance in areas that need improvement such as poor work performance, attendance problems, personal conduct, general compliance with School policies and procedures and/or other disciplinary problems.

Corrective actions may be taken at the discretion of management and include any of the following:

1. Verbal counseling, which may be confirmed in writing by the supervisor
2. Written warning, which will be placed in the personnel file
3. Suspension, which will be confirmed in writing for the personnel file. Suspension is normally used to remove an employee from the organization premises during an investigation, or as a disciplinary action. This may be paid or unpaid. If the employee is suspended, it will be documented in the personnel file.
4. Discharge, which will be documented in the personnel file.

The corrective action process will not always commence with verbal counseling or include every step. The above options are not to be seen as a process in which one step always follows another. Some acts, particularly those that are intentional or serious, warrant more severe action on the first or subsequent offense. Consideration will be given to the seriousness of the offense, the intent and motivation to change the performance, and the environment in which the offense took place. As a reminder, employment remains at-will before, during, and after a disciplinary action.

J. Terminations

There are two types of terminations that may affect employees. Voluntary termination results when an employee voluntarily resigns their employment. Involuntary terminations result when the School makes the decision to end the at-will employment agreement.

Regardless of the reason for termination, all school-owned property, including vehicles, keys, credit cards, student files, or school property in the possession of the employee must be returned to the School immediately upon termination from employment, within 72 hours from the final date of employment with the School. Employees are not to recruit students from the School to a new place of employment.

All wages owed will be paid out upon the date of termination for involuntary terminations or within 72 hours after an employee's resignation if the employee gave 72 hours or less notice.

K. Personnel Records

Employees have a right to inspect certain documents in the personnel file as provided by law. The contents of personnel records will be available for inspection to the current or former employee, or their representative, at reasonable intervals and at reasonable times, but not later than thirty (30) calendar days from the date the School receives a written request. However, the employee, or their representative, and the School agree in writing to a date beyond thirty (30) calendar days to inspect the records, and the agreed-upon date does not exceed thirty-five (35) calendar days from receipt of the written request. Additionally, the School shall provide a copy of the personnel records, at a charge not to exceed the actual cost of reproduction, to a current or former employee, or their representative, no later than thirty (30) calendar days from receipt of the request, unless the current or former employee, or their representative, and the School agree in writing to a date beyond thirty (30) calendar days to produce a copy of the records, as long as the agreed-upon date does not exceed thirty-five (35) calendar days from the employer's receipt of the written request.

The employee may add comments to any disputed item in the file. Only HR, the CEO or designee is authorized to release information about current or former employees. Disclosure of personnel related information to agencies or individuals outside the School will be limited and in accordance with law; however, the School will cooperate with requests from authorized law enforcement or local, state or federal agencies conducting official investigations and as otherwise legally required.

The School is required by law to keep current all employees' names and addresses. Employees are responsible for notifying the School in the event of a name or address change.

L. Destruction of Personal Information Records

In the course of the employee's duties at the School, they may encounter records which contain personal information (i.e., a person's name and Social Security Number, driver's license number, state identification number or any account number, credit or debit card number, access code or passwords that may permit access to an individual's financial account, payroll, or personal health information). The School expects all employees to take appropriate measures to maintain the confidentiality and integrity of such information and prevent unauthorized access. Employees must ensure hard copies of documents are stored securely, such as in a locked file cabinet, with access provided only to authorized individuals with a need to know. Electronic media must be encrypted or password protected. Passwords should never be included in any transmission that also contains the data. Employees should dispose of data no longer needed by shredding paper documents and properly erasing electronic media to ensure that the personal information cannot be read or reconstructed. Failure to follow proper storage and disposal procedures may result in disciplinary action up to and including termination.

M. Employment Posters

The School maintains bulletin boards in School offices and on the HR information system that contain important information about employment. In addition to federal and state required notices, school-related information will also be available in these locations. All employees are encouraged to look at the bulletin board regularly and to read all of the information displayed in detail. Any questions about the information should be directed to the supervisor or HR. These bulletin boards are reserved for School use only; employees may not post or remove any information from them.

N. Outside Employment

This policy is not intended to prohibit an employee from working an appropriate second job. Employees are permitted to engage in outside work or hold other jobs, subject to certain restrictions as outlined below.

(1) Activities and conduct away from the job must not compete, conflict with or compromise the school interests or adversely affect an employee's job performance and the ability to fulfill all responsibilities to the School. Employees are prohibited from performing any services for customers on non-working time that are normally performed by the School. This prohibition also extends to the unauthorized use of any school tools or equipment and the unauthorized use or application of any confidential information. In addition, employees are not to solicit or conduct any outside business during paid working time.

(2) Employees are cautioned to consider carefully the demands that additional work activity will create before accepting outside employment. Outside employment will not be considered an excuse for poor job performance, absenteeism, tardiness, leaving early, refusal to travel or refusal to work overtime or different hours. If outside work activity causes or contributes to job-related problems, it must be discontinued, and, if necessary, normal disciplinary procedures will be followed to deal with the specific problem.

(3) In evaluating outside work, the following guidelines will be considered to determine whether the proposed employment is allowed. Employees may not engage in outside employment that:

- 1) involves working for a competing or similar model School;
- 2) occurs during work hours without the use of appropriate leave;
- 3) actually or potentially results in a conflict of interest with or interfere with the employee's responsibilities to the School;
- 4) involves working for an organization that does business with the School, such as contractors, community providers, suppliers and customers;
- 5) may adversely affect the School's image.

(4) Employees who have accepted outside employment may not use paid sick leave to work on the outside job. Fraudulent use of sick leave will result in disciplinary action up to and including termination.

If it is determined that the outside employment constitutes a conflict of interest or disruption of the School's operation, the employee will be asked to limit or restrict the outside employment. Disciplinary action up to and including termination of employment may be taken for outside employment that is inconsistent with this policy unless otherwise approved.

O. Whistleblower Policy

It is the policy of the School to encourage its employees and applicants for School employment to disclose improper governmental activities, based in part on California Education Code Section 44110 et. seq. and to address written complaints that allege acts or attempted acts of interference, reprisal, retaliation, threats, coercion or intimidation against employees or applicants who disclose improper governmental activities. School management has the responsibility to seek out and correct any and all abuses resulting from improper governmental activities, and to protect those who come forward to report improper governmental activities.

Concerns that may be raised include, but are not limited to, the following:

- 1) Reporting suspected violations of local, state, and federal law, including but not limited to federal laws and regulations;
- 2) Providing truthful information in connection with an inquiry or investigation by a court, agency, law enforcement, or other governmental body; and
- 3) Identifying potential violations of School policy, specifically the policies contained in the handbook with reference to employee safety or health, unsafe working conditions or work practices in the employee's employment or place of employment.

A whistleblower can also be an employee who refuses to participate in an activity that would result in a violation of a state or federal statute, or a violation of or non-compliance with a local, state or federal rule or regulation.

The School may not:

- 1) Make, adopt, or enforce any rule, regulation, or policy preventing an employee from being a whistleblower;
- 2) Retaliate against an employee who is a whistleblower;
- 3) Retaliate against an employee for refusing to participate in an activity that would result in a violation of a state or federal statute, or a violation or noncompliance with a state or federal rule or regulation; or
- 4) Retaliate against an employee for having exercised their rights as a whistleblower in any former employment.

P. Complaint Procedure

The School encourages employees to resolve issues or concerns at the lowest level possible to ensure a positive and professional work environment. When issues cannot be successfully resolved or the issue is serious in nature against the supervisor, the employee should bring the matter to the attention of HR for assistance. The complaint procedure approved by the Board of Directors is as follows:

1. The complainant will bring the matter to the attention of the Human Resources manager as soon as possible after attempts to resolve the complaint with the immediate supervisor have failed or were not appropriate; and
2. The complainant will reduce their complaint to writing, indicating all known and relevant facts, in the School's Internal Complaint Form. The Human Resources manager or designee will then investigate the facts and provide a solution or explanation.
3. If the complaint is about the Human Resources manager, CEO, or Executive Director, the complainant may file their Internal Complaint Form with the President of the School's Board of Directors, who may then confer with the Board

and may conduct a fact-finding investigation or authorize a third party investigator on behalf of the Board. The Board President or investigator will report their findings to the Board for review and action, if necessary.

This policy cannot guarantee that every problem will be resolved to the employee's satisfaction. However, the School values each employee's ability to express concerns, and the need for resolution without fear of adverse consequences to employment.

1. Confidentiality: All complainants will be notified that information obtained from the complainants and thereafter gathered will be maintained in a manner as confidential as possible, but in some circumstances absolute confidentiality cannot be assured.
2. Non-Retaliation: All complainants will be advised that they will be protected against retaliation as a result of the filing of any complaint or participation in any complaint process.
3. Resolution: The School will investigate complaints appropriately under the circumstances and pursuant to the applicable procedures, and if necessary, take appropriate remedial measures to ensure effective resolution of any complaint.

Q. Uniform Complaint Procedures

The School will provide annual notice to all employees of the Uniform Complaint Procedures that may be used to allege a violation of federal or state laws governing certain educational programs. Copies of the Uniform Complaint Procedures and additional information may be found in the board policy section on the School's website or by contacting HR.

R. Arbitration Agreement

Agreement to Arbitrate Disputes and Claims

The School and employee mutually agree to submit to binding arbitration any and all disputes or claims they could otherwise pursue in court arising from or relating to employee's recruitment to or employment with the School, or the termination of that employment, including claims against any current or former agent or employee of the School, whether the disputes or claims arise in tort, contract, or pursuant to a statute, regulation, or ordinance now in existence or which may in the future be enacted or recognized, including, but not limited to, the following:

- claims for fraud, misrepresentation, promissory estoppel, fraudulent inducement of contract or breach of contract, whether such alleged contract or obligation be oral, written, or express or implied;

- claims for wrongful termination of employment, violation of public policy and constructive discharge, infliction of emotional distress, interference with contract or prospective economic advantage, defamation, unfair business practices, invasion of privacy;
- claims for employment discrimination, retaliation or harassment
- claims for violation of local, state or federal wage and hour laws, such as non-payment or incorrect payment of wages, sick pay, commissions, bonuses, severance, employee fringe benefits, or stock options.

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

Claims Not Covered by this Agreement

The following claims are not subject to arbitration under this Agreement: (1) claims for workers' compensation benefits, state or federal disability benefits or state unemployment benefits; (2) administrative charges or claims filed with a federal, state or local government office or agency, such as the Equal Employment Opportunity Commission ("EEOC") or any comparable state anti-discrimination agency, or the National Labor Relations Board ("NLRB"); (3) any claims that, as a matter of law, cannot legally be subject to arbitration; (4) claims under an employee benefit or pension plan that specifies a different arbitration procedure; (5) litigation pending in a state or federal court as of the date Employee signs this Agreement; or (6) claims brought pursuant to the California Labor Code Private Attorneys General Act of 2004.

Waiver of Right to Trial

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

No Consolidation of Claims / Waiver of Class Claims

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

action (i.e. a type of lawsuit in which one or several persons sue on behalf of a larger group of persons).

Arbitration Procedures; Final and Binding Award

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

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

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

Governing Law

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

Costs of Arbitration

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

required or permitted by applicable law. If there is a dispute as to whether the School or employee is the prevailing party in the arbitration, the arbitrator will decide the issue.

Severability

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

Complete Agreement

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

Knowing and Voluntary Agreement

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

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Section V: Operational Considerations

A. Employer Property

Anything purchased with school funds such as computers and educational materials are considered School property and must be maintained according to School rules and regulations. School property is to be used only for work-related purposes. The School reserves the right to search and inspect all School property and any property used by employees in work related duties to ensure compliance with its rules and regulations, without notice to the employee and at any time, not necessarily in the employee's presence.

Employees may make or accept personal telephone calls, text messages, or emails within reason during working hours to perform important personal business. It is also

acceptable to use a computer to perform the same minimal personal tasks. Employees may not use the School's phone to make personal calls that would incur long distance fees.

The School may periodically need to assign and/or change passwords and personal codes for voicemail, email and computer. Except as provided herein, these communication technologies and related storage media and databases are to be used only for School business and they remain the property of the School. The School reserves the right to override any such password system at any time at its sole discretion, with or without cause.

Prior authorization must be obtained from the CEO or designee before any School property may be removed from the School premises, except in the course of normal movement of educational materials/computers by the employee. In this case, regular check-out/tracking procedures must be followed.

Terminated employees who work at a school site should remove any personal items at the time they leave the School. Personal items left in the workplace are subject to disposal if not claimed at the time of an employee's termination.

Employees must safeguard and not damage/destroy School property, including computer hardware or software, e-mails, internal files, notes and correspondence, student records, papers, recordings, pictures, screenshots, and any other items of any nature that belong to or concern the School. Upon separation of employment, employees must return all of the School's property and proprietary information as soon as possible, no later than 72 hours from the final date of employment, and not share, destroy, or retain any copies of such property and information.

Any employee who is found to have neglected or misused the School's property will be subject to disciplinary action up to and including termination. If an employee's misuse of the School's property damages the property, the School reserves the right to require the employee to pay all or part of the cost to repair or replace the property. Misappropriation of the School's property is grounds for immediate termination and possible criminal action.

B. Use of Electronic Media

The School uses various forms of electronic communication including, but not limited to computers, email, telephones and web sites. All electronic communications, including all software, databases, hardware, and digital files, remain the sole property of the School and are to be used only for School business and not for any personal use, except as allowed above.

Electronic communication and media may not be used in any manner that would be discriminatory, harassing or obscene, or for any other purpose that is illegal, against School policy or not in the best interest of the School.

Employees who misuse electronic communications and engage in defamation, copyright or trademark infringement, discrimination, harassment, or related actions will be subject to discipline up to dismissal. The School reserves the right to require authorization prior to installation of software on a School computer and/or mobile devices.

All electronic information created by any employee using any means of electronic communication is the property of the School and remains the property of the School. With School approval, employees may use personal passwords for purposes of security, but any employee's use of a personal password does not affect the School's ownership of the electronic information.

The School may at any time override all personal passwords for any reason.

The School reserves the right to access and review electronic files, messages, mail, and other digital archives, and to monitor the use of electronic communications as necessary to ensure that no misuse or violation of School policy or any law occurs.

Employees are not permitted to access the electronic communications of other employees or third parties unless directed to do so by school administration.

Access to the Internet, websites, and other types of School-paid computer access are to be used for School related business. Any information about the School, its products or services, or other types of information that will appear in the electronic media about the School must be approved by the CEO or designee before the information is placed on an electronic information resource that is accessible to others.

Questions about access to electronic communications or issues relating to security should be addressed to the CEO or designee.

C. Social Media

Social media can serve as a powerful tool to enhance communication. This technology can provide many benefits for communication. This section addresses employees' use of publicly available social media networks including: personal Websites, Web logs (blogs), WIKIs, social networks, online forums, virtual worlds, and any other social media. The School takes no position on employees' decision to participate in the use of social media networks for personal use on personal time. However, use of social media for personal use during School time or on School equipment is prohibited. In addition, employees

must avoid posting any information or engaging in communications that violate state or federal laws or School policies.

General Statement

The line between professional and personal relationships is blurred within a social media context. When employees choose to join or engage with students, families or fellow employees in a social media context that exists outside those approved by the School, they are advised to maintain their professionalism as School employees and have responsibility for addressing inappropriate behavior or activity on these networks, including requirements for mandated reporting. Employees must avoid posting any information or engaging in communications that violate state or federal laws or School policies.

Employees are expected to serve as positive ambassadors and to remember they are role models to students in the community. Because readers of social media networks may view the employee as a representative of the School, the School requires employees to observe the following rules when referring to the School, students, programs, activities, employees, volunteers and communities on any social media networks.

Employees must be respectful and professional in all communications (by word, image or other means). Employees shall not use obscene, profane or vulgar language on any social media network or engage in communications or conduct that is harassing, threatening, bullying, libelous, or that discusses or encourages any illegal activity or the inappropriate use of alcohol, use of illegal drugs, sexual behavior, sexual harassment, or bullying. Be sensitive about linking to content. Redirecting to another site may imply an endorsement of its content.

Employees must make clear that any views expressed are the employee's alone and do not necessarily reflect the views of the School. Employees may not act as a spokesperson for the School or post comments as a representative of the School, except as authorized by the CEO or designee. When authorized as a spokesperson for the School, employees must disclose their employment relationship with the School.

Protect confidential information. Employees may not disclose information on any social media network that is confidential or proprietary to the School, its students, or employees or that is protected by data privacy laws. Employees should be thoughtful about what they publish and must make sure they do not disclose or use confidential information. Students, parents, and colleagues should not be cited or obviously referenced without their approval. For example, ask permission before posting student's/co-worker's picture on a social network (student photos require parental consent) or publishing a conversation that was meant to be private.

It is acceptable to discuss general details about student projects, lessons, or school events

and to use non-identifying pseudonyms for an individual (e.g., teacher, students, parents) so long as the information provided does not make it easy for someone to identify the individual or violate any privacy laws. Public social networking sites are not the place to conduct School business with students or parents; please conduct these interactions using the School's network.

Employees may not post any private images of the School premises and property, such as workrooms, offices, including floor plans. Nothing in this policy is meant to prevent employees from posting information that is allowable by the National Labor Relations Act.

Be transparent. Honesty or dishonesty will be widely available on social media. If the employee is posting about their role at the School, the employee must use their real name and identify their employment relationship. The employee must be clear about their role; if they have a vested interest in something being discussed, to be the first to point it out.

Perception can be reality. In online networks, the lines between public and private, personal and professional are blurred. Employee's identification as a School employee, may create perceptions about expertise and about the School by community members, parents, students, and the general public. When posting online be sure that all content is consistent with employee work values and with the School's beliefs, core values and professional standards.

Work/Personal Distinction. Staff members are encouraged to maintain a clear distinction between their personal social media use and any School-related social media sites. The employee may consider setting up separate social media accounts for personal and professional use.

Personal Social Networking & Media Accounts. Before employees create or join an online social network, they should ask themselves whether they would be comfortable if a 'friend' decided to send the information to their students, the students' parents, or their supervisor. School employees must be mindful that any Internet information is ultimately accessible to the world.

Social Interaction With Students. Employees should not have online interactions with students on social networking sites outside of those forums dedicated to academic use. School employees' personal social networking profiles and blogs should not be linked to students' online profiles.

Contacting Students Off-Hours. Employees should only contact students for educational purposes and must never disclose confidential information possessed by the employee by virtue of their employment. Contacting students after hours must be kept to

a minimum and be strictly for the purpose of academic support or to relay general information to all students.

Be a positive role model. Educational employees have a responsibility to maintain appropriate employee-student relationships, whether on or off duty. Both case law and public expectations hold educational employees to a higher standard of conduct than the general public.

School Logo. The use of the School logo(s) on a social media site or elsewhere must be approved by the CEO or designee.

The School expects all who participate in social media to understand and follow these guidelines.

D. Public Relations

Serving students and families requires a variety of professional skills. School employees are expected to demonstrate the following communication skills and abilities:

1. Ability to transmit passion for learning to students and families.
2. Flexibility and adaptability.
3. Well developed, clear communication and interpersonal skills that maintain a respectful, professional and courteous manner.
4. Conflict resolution skills.
5. Openness to differing views and objectives.
6. Ability to deliver information concerning curriculum, teaching, assessment, and learning to families.
7. Serve the student and parent's needs to the best of their ability without allowing their own convenience to interfere.

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

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

1. Communicate regularly.
2. Act competently and deal with others in a courteous and respectful manner.

3. Communicate pleasantly and respectfully with other employees at all times.
4. Follow up on requests and questions promptly, provide businesslike replies to inquiries and requests, and perform all duties in an orderly manner.
5. Respond to email and voicemail within 24 hours during the workweek.
6. Take great pride in their work and enjoy doing their very best.
7. Be proactive and work to anticipate the needs of those being supported.

When an employee encounters an uncomfortable situation that the employee does not feel capable of handling, their supervisor should be contacted immediately.

If a problem develops or if a parent remains dissatisfied, the employee should contact their supervisor for assistance.

Employees should not speak to the media on the School's behalf without contacting the School's CEO or designee. All media inquiries should be directed to the CEO or designee.

E. Solicitation & Distribution

In order to ensure smooth operations, the School has established the following guidelines to be respected while at work. As long as it is done during non-working hours for all employees involved (such as meal periods or rest breaks), employees are permitted to engage in solicitation (i.e., asking for contributions, selling merchandise) anywhere on School premises, as long as it is done in a non-disruptive and inoffensive manner. Employees may only engage in distribution (i.e., handing out pamphlets, literature, petitions) during non-working hours for all employees involved and in non-working areas (such as the lunch room). Solicitation or distribution is not allowed in areas open to the public. Employees are prohibited from posting notices on the School bulletin board or in any other office location and from removing any items without management approval. The School may, at its discretion, authorize certain fund-raisers and collections for employee gifts. Employees who want to organize such an event, must obtain prior approval from the supervisor. Solicitation and distribution by non-employees is prohibited at all times on School property.

F. Inclement Weather/Emergency Closings

At times, emergencies such as severe weather, fires, or power failures can disrupt School operations. The decision to close the office will be made by the CEO or designee. When the decision is made to close the office, employees will receive official notification from their supervisors. Time off from scheduled work due to emergency closings will be unpaid for all nonexempt employees. However, employees eligible for vacation may elect to utilize their available vacation hours in order to remain in paid status.

Employees are encouraged to listen to local news and radio reports. In general, the School will follow the decisions of the local community. Days that the School is closed due to inclement weather or other emergency may create a need to extend the work year or shorten holiday breaks.

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Section VI: Health and Safety

All employees are responsible for their own safety, as well as that of others in the workplace. To help maintain a safe workplace, everyone must be safety-conscious at all times. In compliance with California law, and to promote the concept of a safe workplace, the School maintains an Injury and Illness Prevention Program.

In compliance with Proposition 65, the School will inform employees of any known exposure to a chemical known to cause cancer or reproductive toxicity. See the School's Safety Plan for more information.

A. Telecommuting

The School may allow employees to telecommute if it benefits the interests of the School. A written proposal for such arrangements must be presented to HR and the supervisor for review and approval. Employees who telecommute may be required to attend in-person meetings at the office or other designated locations.

Telecommuting does not change the employee's work location and employees are still responsible for all costs associated with travel to and from the office as part of their reasonable commute, when they are required to report to their work location.

Employees are encouraged to speak with a tax professional as to any tax benefits or deductions for utilizing a home office. Employees are responsible for any tax liability should they claim such an expense and it is later disallowed by the Internal Revenue Service.

Employees who telecommute must maintain the security of all confidential and/or sensitive information and other proprietary information, as if they were working in the office. All security procedures apply, regardless of whether the employee is in the workplace or telecommuting. Certain confidential documents or information will not be taken home without authorization from the CEO or designee.

Employees who telecommute are responsible for following all safety rules.

Telecommuters will develop a written agreement with the CEO or designee concerning the type and amount of work the telecommuter will be expected to perform. The ability to telecommute does not change the level of performance expected from an employee. Nonexempt employees will track their time in the system and report work accomplished at a frequency agreed upon with the supervisor. Exempt employees must complete the duties as outlined in their job description and assigned by their supervisor.

Employees who are subject to overtime laws are required to adhere to their beginning and ending work times, rest break, and meal periods. Telecommuting employees must continue to maintain required time records. Work time must be recorded on the employee's time card.

The School retains the right to require a reapproval process and/or rescind any telecommuting agreement at any time and to require any telecommuter to report to the office or work location to work.

Violation of any telecommuting policies may result in the immediate termination of any telecommuting agreement. For additional information, please review the Remote Work Policy and contact Human Resources.

B. Student Safety

The effective employee is concerned for the welfare of students and takes measures to insure their welfare. Nevertheless, it is important to be aware of the possible consequences of negligence. The employee is responsible to act in a reasonable and prudent manner at all times. Specifically, the employee must do the following:

1. Never leave students unsupervised and ensure that another responsible adult is present when leaving students.
2. Require students to conduct themselves in an orderly, safe manner and administer such disciplinary actions as are reasonable and proper in any situation involving student misconduct.
3. Report any unsafe conditions to the supervisor so that it may be corrected.
4. Strictly adhere to all stated policy of the district and of the School.

Failure by employees to meet their responsibilities may have severe consequences (e.g., revocation of their license, criminal charges, etc.). Additionally, teachers may be held legally liable for negligence in the performance of their duties.

C. Employee Safety

The School is committed to providing the resources necessary to develop, implement, and administer a safety program for the protection of its employees. All administrative

personnel and employees are expected to meet their responsibilities to make the safety program effective and productive. Periodic reviews of the safety program will be conducted by administration to maintain its effectiveness.

All accidents, injuries, potential safety hazards, safety suggestions and health and safety related issues must be reported immediately to the supervisor, CEO, or HR. When reporting the injury, an employee should advise staff if emergency services should be involved, or if the injury requires medical attention. HR will help determine the best course of action. If an injury does not require medical attention, an Employer Report of Injury/Illness Form must still be completed in case medical treatment is later needed and to ensure that any existing safety hazards are corrected. The Employee's Claim for Worker's Compensation Benefits Form must be completed in all cases in which an injury requiring medical attention has occurred. The employer will immediately notify OSHA in the event the employee sustains a serious illness, injury, or exposure that results in hospitalization as per CalOSHA guidelines.

D. Transporting Students

Employees are not permitted to transport students. In the event a student needs transportation for a school-related purpose, the School will arrange for transportation in coordination with the parent or guardian.

E. Employee Driving Policy

EACS must ensure that risks to the School are minimized and ensure that only safe drivers are allowed to drive on School business. The Board requires that all employees who regularly drive as part of their job duties (“Driving Employees”) meet minimum standards of safety and insurance, which must be verified by the School. Driving employees must obey all traffic laws and drive safely while on School business.

Positions requiring driving shall state such in the job description and staff will be required to maintain a valid driver’s license and vehicle insurance in order to meet the minimum qualifications of the position and perform the essential duties of the role. This policy covers all school employees and violation of the School’s policy is grounds for discipline up to and including termination.

Driver’s License and Insurance Coverage

1. In order to operate a personal vehicle when used to perform EACS business, Driving Employees must have a valid driver’s license and automobile insurance meeting the minimum standards established in this policy at all times. Evidence of the Driving Employee’s driver’s license and automobile insurance certificate will be kept on file. The Driving Employee is responsible for providing an updated driver’s license and automobile insurance certificate whenever it expires or upon request. The

Executive Director or designee must be notified immediately if the Driving Employee no longer has a valid driver's license or insurance certificate. Any Driving Employee whose driver's license or insurance certificate lapses or is canceled or revoked for any reason, and who cannot otherwise arrange for travel as required by their position, may be terminated or placed on inactive/unpaid status until the issue is remedied.

2. EACS requires that a Driving Employee carry the following insurance amounts and coverage:

Automobile Liability - \$100,000 per person; \$300,000 per occurrence

Property Damage - \$50,000 per occurrence

Medical Payments - \$5,000 per person

Notification of Traffic Violations Resulting in Criminal Convictions

EACS receives notifications from the Department of Justice (DOJ) when an employee has been arrested and when there has been a conviction for a crime. Notification of a traffic violation resulting in a misdemeanor or felony charge will be discussed with the employee. Certain driving violations may be grounds for termination from a position that requires regular driving such as:

1. Attempting to evade a police officer
2. Driving with a revoked or suspended license
3. Hit and run
4. Speeding over one hundred (100) miles per hour
5. Reckless driving
6. Driving under the influence of drugs and alcohol

Responsibilities of Human Resources

When recruiting for positions that require the employees to operate a vehicle the posting notice shall advise applicants that a current driver's license record and verification of automobile insurance will be required prior to a final job offer.

Employee Responsibility

Employees are responsible for maintaining driver's licenses and special certificates required for the performance of job duties. Employees are also responsible for promptly notifying their supervisor of expiration, conviction, or other DMV actions against their driver's license or certificate by no more than five (5) business days from the occurrence.

Use of Electronic Devices While Operating a Vehicle

EACS recognizes staff members may spend a considerable amount of time driving for business purposes. It is the intention of the School to ensure all staff members are safe while driving a vehicle. Although hands-free options are available, it is the policy of the School to discourage employees from utilizing a cell phone or other electronic devices while operating a vehicle.

Distracted driving can be described as any visual, cognitive or manual distraction which takes attention away from the task of safe driving.

Employees are expected to follow all federal and state distracted driving laws. Employees who are charged with traffic violations resulting from the use of an electronic device while driving will be solely responsible for all liabilities that result from such actions.

The School highly encourages employees to use their best judgment and reserve all conversations conducted on an electronic device for when they are not in operation of a vehicle. It is recommended that employees find a safe location and park their vehicle prior to placing or accepting a telephone call. Texting while driving is prohibited. Voice texting while driving is strongly discouraged. Safety must come before all other concerns.

Revocation of Driving Privilege

1. The Human Resources Director or designee will monitor the subsequent arrest notifications from the DOJ. Any Driving Employee who is convicted of a DUI, loses their driver's license or driving privilege, or is deemed to be a "negligent operator" by the DMV, and fails to make suitable arrangements for alternative transportation to maintain meetings as an essential function of their position will immediately be placed on unpaid administrative leave.
2. Seatbelts are an essential element of the School's safety procedures. To emphasize seat belt awareness, one (1) seatbelt violation while on EACS business will equate to a moving violation and may lead to disciplinary action. Repeat seatbelt violations could lead to termination of the at-will employment agreement.

Alternative Transportation

All employees must make suitable arrangements to ensure timely attendance at all appointments that are essential job functions. With the advance approval of the Executive Director or designee, the employee may be reimbursed the actual miles traveled using the Schools' current mileage reimbursement rate, for their travel using public transportation or rideshare service where a personal vehicle is not available or alternative transportation is not feasible. Driving Employees will not be reimbursed additional charges and expenses outside of the actual miles traveled for utilizing a rental car, taxi, or rideshare service in the event that the employee's personal vehicle is unavailable.

Nothing in this policy is intended to replace the employer's responsibility to engage in the interactive process with an employee who has requested accommodation due to an illness, injury, or disability. The HR manager or designee will ensure compliance in all matters pertaining to this policy.

F. Contagious Illnesses in the Workplace

The School realizes that employees with contagious temporary illnesses such as influenza (including COVID-19, H1N1 or Swine Flu), colds, and other viruses, or other communicable diseases may wish to continue with normal life activities, including working. In deciding whether an employee with an apparently short-term contagious illness or communicable disease may continue to work, the School considers several factors. The employee must be able to perform normal job duties; meet regular performance standards; and, in the School's judgment, pose no potential risk to the health or safety of the employee or others. If the School determines that an employee is unable to perform normal job duties; meet regular performance standards; or represents a potential risk to the health or safety of the employee or others, the School reserves the right to send the employee home and require the use of any available sick or vacation time, and if none is available the time would be unpaid. If an employee disagrees with the School's determination that such a risk exists, the employee must submit a statement from their attending healthcare provider that the employee's continued presence at work poses no significant risk to the employee, other employees, or students before they are allowed to return to work.

The following are general health and hygiene practices recommended by the Centers for Disease Control:

1. Stay home when sick. An employee should not return to work until they have been free of a fever for at least 24 hours.
2. Use proper etiquette: cover the cough or sneeze with a tissue or cough or sneeze into the elbow.
3. Wash hands often, especially after sneezing, coughing, or having contact with others. Alternatively, use a hand gel disinfectant and rub hands until the gel is dry.
4. Avoid touching eyes, nose, or mouth.
5. Ensure that general use office machines, such as shared computers, faxes, and copiers, are wiped down with disinfectant.
6. Healthy lifestyles are encouraged, including good nutrition, exercise, and adequate rest.

Supervisors will encourage employees to utilize paid sick and vacation if available to cover absences due to contagious temporary illnesses. Please contact HR regarding any questions about the possible contagious nature of any illness in the workplace.

The School will comply with all applicable statutes and regulations that protect the privacy of persons who have a contagious or communicable disease.

In the case of a pandemic (such as COVID-19, H1N1 or Swine Flu) or illness, the School may implement specific procedures through its emergency communication action plan including utilizing employees in essential operation positions; implementing controls and

scheduling in the work environment; encouraging ill employees to stay home; modifying work schedules; implementing telecommuting; minimizing non-essential travel; social distancing (reducing frequency, proximity, and duration of contact between people); utilizing phone, email, and video-conferencing; personal protective equipment (PPE); and education and training on safe work practices, risk factors, and protective behaviors. Employees will be notified if the emergency communication action plan is implemented.

G. Gun Violence Restraining Order

If an employee, parent, or student demonstrates a substantial likelihood of significant danger or harm to self or others, a gun violence restraining order petition may be filed. The petitioner may be an immediate family member, law enforcement officer, employer, co-workers with employer approval who regularly interact with the person, or an employee or teacher of a secondary or postsecondary school. A copy of the restraining order is to be submitted to human resources.

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Section VII: Employee Wages and Benefits

A. Wages

Several factors may influence the compensation for a position. Each position is defined by a broadly written job description that indicates the duties to be performed and the necessary knowledge, skills, and abilities for the assignment. These factors are reviewed when determining the appropriate compensation. Some of the items the School considers are the nature and scope of the job duties, what other employers pay their employees for comparable jobs (external equity), what the School pays their employees in comparable positions (internal equity), and individual work as well as performance. Wages are also affected by legislative changes and the State's economy, and may be adjusted upward or downward as changes occur.

Initial step placement will be based on related prior experience. The Executive Director is given authority to offer a higher entry step placement in areas of shortage such as math, science, or special education in order to secure highly qualified candidates for positions. Step advances will be considered for employees who remain in paid status for at least 75% of the work year calendar. Consideration for step advancement will also be based upon the School's budget solvency, successful employee performance, and any other relevant factors.

The employee's performance review will usually be conducted on or about the end of the fiscal year. A positive performance review will not necessarily result in a change in

compensation.

B. Stipends

Stipends may include supplies, cell phone/internet, and/or mileage. Stipends may also be issued for performing specific additional job duties. Stipends may be evenly distributed across the employee's pay periods or issued at the time the services are rendered. All stipends will be reviewed annually.

C. Paydays

All salaried exempt employees are paid on the 26th of the month. In the event that a regularly scheduled payday falls on a weekend or holiday, employees will receive pay on the prior day of operation.

Hourly and salaried nonexempt employees are paid on the 10th and 26th of each month. Hours worked from the 16th through the last day of each month will be paid on or before the 10th of each month. Hours worked from the 1st through the 15th of the month will be paid on or before the 26th of each month. For more information on pay periods, please contact HR.

Paychecks will not, under any circumstances, be given to any person other than the employee without written authorization. Employees will be paid through manual checks or through direct deposit of funds to savings or checking accounts at their bank of choice (providing the bank has direct deposit capability). To activate direct deposit, a Direct Deposit Authorization form may be obtained from HR. Due to banking requirements it may take several weeks for activation of the direct deposit.

Every effort is made to avoid errors in calculating and distributing paychecks. Employees should inform HR if they believe an error has been made or pay has not been received. HR will take steps to research the problem and endeavor to make any necessary corrections as soon as possible or at least by the next regular pay day.

D. Payroll Withholdings

As required by law, the School shall withhold Federal Income Tax, State Income Tax, Social Security (FICA) for non-credentialed employees, CalSTRS for eligible Teachers/Administration and State Disability Insurance from each employee's pay as follows:

1. Federal Income Tax Withholding: The amount varies with the number of

- exemptions the employee claims and the gross pay amount.
2. State Income Tax Withholding: The same factors which apply to federal withholdings apply to state withholdings.
 3. For non-credentialed employees: Social Security (FICA) - The Federal Insurance Contribution Act requires that a certain percentage of employee earnings be deducted and forwarded to the federal government, together with an equal amount contributed by the School. The current tax rate is used in the calculation. Each party is responsible for contributing. Eligible credentialed employees participating in CalSTRS do not contribute to Social Security.
 4. State Disability Insurance (SDI): This state fund is used to provide benefits to those out of work because of illness or disability.
 5. For credentialed employees contributions will be deducted and remitted to California State Retirement System (CalSTRS). The CalSTRS is a special trust fund established by California law. Per the guidelines of CalSTRS, the school will abide by membership eligibility. A contribution withdrawal begins with the first pay period. This contribution is in lieu of Social Security withholding tax from the paycheck. Additionally, the School contributes into the CalSTRS fund. All employee and employer contributions are determined by CalSTRS. Further information regarding CalSTRS accounts can be found at www.CalSTRS.com.
 6. For all employees participating in employee benefits offerings such as health insurance, the employee contribution for benefits (the amount that exceeds the employer's contribution towards benefits) will be deducted from the employee's paycheck. The amount will be discussed and approved prior to the deduction being made. Please reference "Employee Cost Sharing" under "Employee Benefits" section of the Handbook for more information.

Every deduction from the paycheck is explained on the paystub, which will be available in the HR/Payroll Information System. If any deduction is unclear, contact HR.

All Federal, State, and Social Security taxes will be automatically deducted from paychecks. Federal and State Withholding Tax deduction is determined by the employee's W-4 (Federal) and DE-4 (State) forms. The W-4 and DE-4 forms are to be completed upon hire. The employee may change the number of withholding allowances they wish to claim for Federal Income Tax purposes at any time in the HR information system by updating their W-4 and DE-4 withholdings.

At the end of the calendar year, a "withholding statement" (W-2) will be prepared and provided to each employee for use in connection with preparation of income tax returns. The W-2 shows Social Security information, taxes withheld, and total wages.

While the School strives to process payroll correctly, an error may occur from time to time. If this happens, every effort will be made to correct the problem as quickly as possible and to avoid future errors of a similar nature. Employees will not be subjected to discrimination, harassment, or retaliation for coming forward with a complaint or

question about their paycheck.

E. Wage Attachments and Garnishments

When an employee’s wages are garnished by court order, the School is legally bound to withhold the amount indicated in the garnishment order from the employee’s paycheck. The School will, however, honor the Federal Consumer Credit Protection Act, which places restrictions on the total amount that may be garnished from an employee’s paycheck.

F. Employee Benefits

The School is committed to providing quality and cost effective benefit options (e.g. health, dental, vision, and life insurance) for eligible employees as part of the total employee compensation. Benefit eligibility may be dependent upon employee classification (full-time versus part-time, for example). Benefit eligibility requirements may also be imposed by the School and/or plans themselves. Policies, provisions and procedures that govern the organization's benefit program apply to all regular full-time and part-time employees, whether exempt or nonexempt status, unless otherwise noted in the employment agreement.

1. Employee Cost Sharing

Voluntary employment benefits, those benefits that are not mandated by state or federal law, are selected and controlled by the School. Decisions to provide and continue providing these benefits are based on such considerations as cost, composition of the workforce, operational efficiency, and desirability of benefit provisions. Where costs of discretionary insurance benefit plans exceed the School's interest, ability, or willingness to pay the full premium rate to maintain the current benefit level, employees may be required to share in the cost in order to continue the insurance plan coverage.

Exempt (<i>FTE</i>)	Non-Exempt (<i>Hours per Week</i>)	<i>Eligible employees will have the option to choose to enroll in benefits or elect a cash in lieu stipend with proof of alternate coverage.</i>	
		*Tiered Benefit Stipends (for Health, Dental, and/or Vision)	*Cash In Lieu of Benefits
.75+ FTE	30+ hours	\$1,300/month	\$200/month
.50 - .74 FTE	20-29 hours	\$780/month	\$100/month

.49 FTE or less	19 hours or less	not eligible	not eligible
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2. Benefit Design and Modification

The School reserves the right to design plan provisions and to add, eliminate, or in other ways modify any School provided benefits described in this handbook or elsewhere in plan documents, where and when it is deemed in the School's best interest to do so. These benefits are subject to change depending on management decisions and resources.

3. Benefit Plan Documents

Employees will be provided with summary plan descriptions upon eligibility and enrollment. The benefit programs are explicitly defined in legal documents, including insurance contracts, official plan texts, and trust agreements. In the event of a conflict between these documents and this policy, the plan documents will govern. All of these official documents are readily available from HR for review. Questions about this information should be directed to HR.

4. Cash in Lieu of Health Benefits

Eligible employees may opt out of health benefits provided by the School and elect to receive a “Cash in Lieu” (CIL) option. CIL is dependent upon employment status and full time equivalent, included but not limited to hours worked or number of students assigned per pay period. Please refer to the employment agreement for more information.

In order to be eligible for cash in lieu of health benefits, an employee must provide proof of enrollment in a qualifying group health plan, including their name and the effective date of coverage, on their spouse or parent's employer sponsored plan, State Medicaid, Medicare, or VA Benefits. Proof of enrollment must be provided at the time of benefit enrollment for new hires or during the open enrollment period in order for the cash in lieu of benefits to be paid. Individual Family Plans (IFP) and Covered California coverage plans are not eligible for cash in lieu of benefits. All eligible employees will automatically be enrolled in the employer provided life insurance plan. Payment of the appropriate CIL amount will occur on each pay period of the current school year.

If the employee should enroll part way through the plan year due to a Qualifying Life Event (QLE), or if hired after the start date for the position, the annual CIL will be adjusted at the next pay period.

5. Right to Modify

The School reserves the right to amend, modify or terminate, in whole or in part, any or all of the provisions of the benefit plans described herein, including any health benefits that may be extended to retirees and their dependents to the extent allowed by law. Notice of any such changes will be provided, as required by law. Further, the School reserves the exclusive right, power and authority to administer, apply and interpret the benefit plans described herein, and to decide all matters arising in connection with the

operation or administration of such plans, to the extent allowed by law. This section is subject to change in accordance with changes in the law.

6. Changes in Health Benefits

Employees may make changes to their plans outside of open enrollment if they experience a Qualifying Life Event (QLE). Examples of such events include marriage, divorce, birth, adoption, loss of coverage, etc. An employee has 30 days from the date of the QLE to notify human resources and enroll in or make changes to their health plan.

For more complete information regarding any of the benefit programs, please contact HR.

7. COBRA Benefits

The Federal Consolidated Budget Reconciliation Act (COBRA) gives employees and their qualified beneficiaries the opportunity to continue health insurance coverage under the health plan when a “qualifying event” would normally result in the loss of eligibility. Some common qualifying events are resignation, termination of employment, or death of an employee, a reduction in an employee’s hours, leave of absence, divorce or legal separation, and a dependent child no longer meets eligibility requirements.

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

8. Look-back Measurement Method – Seasonal and Variable Hour Employees

For seasonal employees as well as part time employees hired to work less than 20 hours per week the School will use a look-back measurement method to determine benefit eligibility status.

This method is used to determine the benefits eligibility status of an employee by looking back over a defined period of time (12 months) to determine if the employee averaged at least 20 hours per week during that period. The initial measurement period begins on the first day of the calendar month following a one month probationary period.

A stability period (designated period where coverage must be offered) of 12 months will be offered to all individuals identified as employees working at least 20 hours per week on average during the measurement period.

After a new variable-hour or seasonal employee has been employed for a standard measurement period, the employee is considered to be an ongoing employee and will have their hours measured from open enrollment or plan year.

G. Retirement Plan Offerings

The School is committed to providing retirement benefits to the employees. Plan details may be obtained through HR.

403(b)/457(b) Deferred Compensation Plan

All employees can open a 403(b) and/or 457(b) account and make employee contributions through payroll deductions.

Employer Contributions:

The employer contribution towards a deferred benefit plan is based on an eligible employee's active contribution to a 403(b) or 457(b) account. Eligible employees must open a 457(b) account in order to receive the employer contribution. The employer contribution will be made to the employee's 457(b) account in an amount not to exceed a matching contribution up to 7% of the employee's base annual salary. Eligible employees are immediately vested in employer contributions. Seasonal employees are not eligible for employer contributions.

Classified Employees: To be eligible for an employer contribution, a classified employee must work at least 20 hours/week.

Certificated Employees: To be eligible for an employer contribution, a certificated employee must serve a minimum number of students, work at least 20 hours/week, or have an assignment at least 0.5 FTE.

Certificated staff participating in CalSTRS are not eligible for an employer contribution to a 457(b) plan.

California State Teachers Retirement System (CalSTRS)

The School may offer a defined benefit plan through CalSTRS. Eligible credentialed employees employed at a CalSTRS school will be mandatorily enrolled in CalSTRS, and have employer and employee contributions submitted to CalSTRS on a monthly basis. Benefit information on this program is available at the CalSTRS website at www.calstrs.com.

H. Expense Reimbursement Process

1. Supplies

Due to the virtual nature of this business, it may sometimes be most practical for employees to initiate purchases locally and be reimbursed for those expenses. Reasonable, actual business expenses incurred by employees for the purpose of conducting business on behalf of the School shall be reimbursed upon approval. Employees receiving a stipend for supplies may not exceed the stipend amount.

Pre-approval by a supervisor is required in the event the employee wishes to purchase an item that exceeds the amount of the stipend.

2. Travel

The School will only reimburse actual and necessary expenditures for staff. Attendees shall be held accountable for good judgment regarding expenditure of tax dollars. All expenditures must have scanned copies of itemized original receipts, regardless of the amount. The School shall not reimburse personal travel expenses including, but not limited to, alcohol, entertainment, laundry, expenses of any family member who is accompanying the employee on school-related business, personal use of an automobile, and personal losses or traffic violation fees incurred while on school business. Factors such as variances in regional costs, travel duration and extenuating circumstances will be considered when approving travel reimbursement. In addition to those items listed below, associated travel fees such as parking fees, taxis/shuttles, and luggage handling are reimbursable expenses.

Employees are pre-approved to expense those costs associated with traveling for school-related purposes including testing and professional development. Scanned copies of original itemized receipts are required for reimbursement.

3. Mileage

The mileage reimbursement rate is based on the rate established by the Internal Revenue Service. Employees must include verification of miles driven either using a platform adopted by the School, or by attaching a Mapquest/Google map or the like, with the request for reimbursement.

4. Hotel Rooms

Lodging shall be for those days associated with attending the activity, including, if necessary, the night before. Good judgment shall be used to seek the most reasonable accommodations. Please see the Travel Manual for additional details.

5. Meals

Employees who are required to work or participate in training away from the regular work location may be reimbursed the cost of meal(s). Meals provided in conjunction with conferences, workshops, seminars, meetings that exceed these amounts are excluded from these limitations. No meals will be reimbursed for meals provided at/during the conference/training. Please see the Travel Manual for additional details.

The reimbursement rates are:

\$20 for breakfast, \$25 for lunch, \$30 for dinner plus service gratuity maximum of 18%. The total amount reimbursed for meals per day will not exceed \$75. Alcohol is not

reimbursable and must be deducted from any reimbursement requests. If an employee exceeds the allotment for meal expenses, the balance above the daily allocation will be deducted from the total expense on the expense report. Please see the Travel Manual for additional details.

6. Postage

Employees will be reimbursed for any postage related expense requested by the School. Employees must get pre approval from a supervisor for shipping expenses and must discuss the best shipping method with the supervisor.

For employees who receive a monthly supply stipend, only the portion of the expense that exceeds the stipend will be reimbursed.

7. Procedure for Expensing

Employees must have pre-approval prior to making any purchases that will warrant reimbursement. Approval may be obtained by sending an email to the CEO or Executive Director with a short description of what will be purchased.

Expense reimbursements must be submitted within thirty (30) days of the charge. Expense reports submitted after this time may not be reimbursed within the current cycle and/or may be delayed and processed in the next cycle. Please see the Travel Manual for additional details.

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Section VIII: Leaves, Vacation, and Holidays

A. Healthy Workplaces/Healthy Family Act of 2014

The School, in compliance with the Healthy Workplaces/Healthy Family Act of 2014 (AB 1522), allows all full time and part time employees who work at least 30 days within a year in California to accrue paid sick leave hours. Accrual begins on the first day of employment. The employee must work at least 30 days before taking any available accrued sick leave.

B. Paid Sick Leave

Paid sick leave may be used for an employee's own illness, for preventative care or

diagnosis, care or treatment of an existing health condition, or time off to care for an ill or injured family member or dependents, which include children, parents, spouse, registered domestic partner, grandparents, grandchildren, siblings and those related to the employee by blood or affinity equivalent. Sick leave may also be used when an employee needs to manage matters surrounding domestic violence, sexual assault, stalking or when their worksite or their child's school or daycare closes due to public health emergencies. Except in the case of an illness or emergency, sick leave must be requested at least five (5) days in advance by submitting the request through the payroll system. Employees using extended sick leave (in excess of 5 days) must submit a request at least two weeks before the extended leave.

Employees requesting sick leave may be required to submit a health care provider's statement or, in cases of individuals with sincerely held religious beliefs in faith healing or comparable religious practices, a statement authorized under EEOC guidelines, stating the reason for absence and dates of illness. Employees absent more than five (5) days may be required to submit a health care provider's statement or note that the employee is fit for return to service.

Employees will be paid their regular compensation when using paid sick days. Sick leave hours will not be advanced ahead of the earned accrual.

Employees may use sick leave in thirty minute minimum increments, which will be deducted from the employee's accrual balance. Employees are not required to find a replacement for their work while taking protected sick time. Paid sick day balances are available for employee review through the payroll system and on pay stubs. For all hours submitted as sick leave, the time will be uninterrupted and the work day schedule will not need to be adjusted to accommodate the absence.

Any unused sick hours will roll over from year to year. Sick leave hours will not be advanced to an employee ahead of the earned accrual rate. Accrued, but unused sick days are not paid out by the School at the time of separation. However, employees who terminate employment and are rehired within one (1) year of termination (or 6 months for employees working in the city of San Diego) regain their previously unused accrued sick leave.

Any employee who continues to be absent after their sick leave accrual has been exhausted may have a payroll deduction equivalent to the number of hours absent. Salaried employees will only have full day absences deducted from their paycheck once their sick leave accrual is exhausted.

1. Paid Sick Leave - Full Time Employees

The School provides sick pay for full time employees who regularly work a minimum of

30 hours per week. All full time classified, non-teaching certificated and special education certificated employees accrue one (1) sick day per month in paid status. Nonexempt employees are paid semi-monthly, and will accrue the equivalent of one half day per pay period. All employees who fall under this accrual method are guaranteed to accrue a minimum of 24 hours by the 120th day of employment and subsequent accrual years in accordance with State law.

Certificated Sick Accrual <i>Full Time Certificated Employees</i>					
Sick Leave	Student Count or FTE	Hours Worked Per Week	Non-Exempt: Per Pay Period	Exempt: Per Pay Period	Total Sick Hours Accrued Monthly
Tier 2	.75 to 1.0 FTE	30+ hours	4/4	8	8

Classified Sick Accrual <i>Full Time Classified Employees</i>					
Sick Leave	FTE	Hours Worked Per Week	Non-Exempt: Per Pay Period	Exempt: Per Pay Period	Total Sick Hours Accrued Monthly
Tier 2	.75 to 1.0	30+ hours	4/4	8	8

2. Paid Sick Leave – Part Time, Per Diem, Seasonal, and Temporary Employees

The School provides all part-time, per diem, seasonal and temporary employees who work at least 30 days in California within a year with at least 24 hours (3 days) of paid sick leave in a 12 month period. Employees will be paid at their regular hourly rate when they take paid sick leave.

Employees start accruing hours on the first day of employment and must work for 30 days before they can take sick leave. Employees earn at least 1 hour of paid leave for every 30 hours worked. Employees may accrue more than 24 hours (3 days) of paid sick leave in a year. Sick leave accrual will be capped at 48 hours (6 days), in compliance with both state and city ordinances.

Sick Accrual

<i>Part Time, Per Diem, Seasonal, and Temporary Employees</i>					
Sick Leave	Full Time Equivalent (FTE)	Hours Worked Per Week	Non-Exempt: Per Pay Period	Exempt: Per Pay Period	Total Sick Hours Accrued Monthly
Tier 1	.50 - .74	20-29	3/3	6	6
CA SL	.49 or less	19 or less	2/2	-	4

C. California State Benefits

California State Disability Insurance (SDI) is funded through employee contributions and is designed to provide eligible workers with partial wage replacement when taking time off work for their non-work-related illness or injury, pregnancy, or childbirth.

California Paid Family Leave (PFL) provides employees residing in the State of California with the ability to access their State Disability Insurance for partial wage replacement benefits to care for a seriously ill child, parent, parent-in-law, grandparent, grandchild, sibling, spouse, or registered domestic partner, or to bond with a new child by birth, adoption, or foster care placement.

PFL Military Assist benefits are available to eligible employees who request time off work to participate in a qualifying event due to the military deployment of their spouse, registered domestic partner, parent, or child to a foreign country.

Employees must notify HR of their plan to take leave and the reason for taking leave according to the School's policy. HR is available to assist employees with applying for State Disability benefits through the Employment Development Department. Employees may be eligible to receive PFL benefits while on a leave of absence to care for a seriously ill family member or for baby bonding. Employees are not eligible for PFL benefits when on PDL, FMLA, or CFRA leave for their own serious health condition.

PFL is not a guaranteed right to a leave of absence, and employees taking PFL or PFL Military Assist are not provided job protection rights or a right to return to the same position following their absence.

D. Pregnancy Disability Leave (PDL)

An employee may take pregnancy disability leave (PDL) if the employee is disabled

because of pregnancy, childbirth, or a related medical condition, including prenatal care and severe morning sickness. The length of leave is dependent on a medical certification and the duration may be up to 17 1/3 weeks or the equivalent number of days the employee would normally work within the same period. Intermittent leave or a reduced work schedule may be taken.

Employee Eligibility Criteria

To be eligible for pregnancy disability leave, the employee must be disabled by pregnancy, childbirth, or related medical condition and must provide appropriate medical certification concerning the disability.

Events That May Entitle an Employee to Pregnancy Disability Leave

The 17 1/3 week pregnancy disability leave allowance includes any time taken (with or without pay) for any of the following reasons:

- The employee is unable to work at all or is unable to perform any one or more of the essential functions of their job without undue risk to self, the successful completion of pregnancy, or to other persons because of pregnancy or childbirth, or because of any medically recognized physical or mental condition that is related to pregnancy or childbirth (including severe morning sickness); or
- The employee needs to take time off for prenatal care.

Duration of Pregnancy Disability Leave

Pregnancy disability leave may be taken in one or more periods, but not to exceed four months total. "17 1/3 weeks" means the number of days the employee would normally work within that period. For example, a full-time employee who works five eight hour days per week, four months means 88 working and/or paid eight hour days of leave entitlement based on an average of 22 working days per month for four months.

PDL will run concurrently with other applicable leaves, such as FMLA leave. The 12-month look-back period will apply to all leaves granted concurrently.

1. Pay During Pregnancy Disability Leave

An employee on pregnancy disability leave may use all accrued paid sick leave at the beginning of any otherwise unpaid leave period. The receipt of sick leave pay, or state disability insurance benefits will not extend the length of pregnancy disability leave.

Sick pay will accrue during any period of unpaid pregnancy disability leave only until the end of the month in which the unpaid leave began. For example, an employee who delivers their baby on March 5 and goes out on leave on that date, would earn one day of

sick leave for the month of March. Accrual for leave would be suspended until the employee returns from leave. All sick leave will be applied starting with the first day of absence until the leave is exhausted.

2. Health Benefits

The provisions of various employee benefit plans govern continued eligibility during pregnancy disability leave and these provisions may change from time to time. When a request for pregnancy disability leave is granted, the School will give the employee written confirmation of the arrangements made for the payment of insurance premiums during the leave period.

If the employee takes pregnancy disability leave and is eligible under the Family Medical Leave Act (FMLA), the School will maintain group health insurance coverage for up to a maximum of 12 workweeks (if such insurance was provided before the leave was taken) on the same terms as if the employee had continued to work after PDL ended. Leave taken under the pregnancy disability policy runs concurrently with FMLA under federal law, but not California Family Rights Act (CFRA). If the employee is ineligible under the federal and state family and medical leave laws, while on pregnancy disability they will receive continued paid coverage on the same basis as other medical leave that the School may provide and for which the employee is eligible, such as continued PDL. In some instances, the School may recover premiums it paid to maintain health coverage for the employee if they fail to return to work following pregnancy disability leave.

3. Medical Certifications

An employee requesting a pregnancy disability leave must provide a medical certification from their healthcare provider on a form supplied by the School. Failure to provide the required certification in a timely manner (within fifteen (15) days of the leave request) may result in a denial of the leave request until such certification is provided.

Re-certifications are required if leave is sought after expiration of the time estimated by the healthcare provider. Failure to submit required re-certifications can result in termination of the leave.

4. Requesting and Scheduling Pregnancy Disability Leave

An employee should request pregnancy disability leave by contacting HR.

The employee should provide at least thirty (30) days notice or as long of notice as is practicable, if the need for the leave is foreseeable.

Where possible, employees must make a reasonable effort to schedule foreseeable planned medical treatments so as not to unduly disrupt the School's operations.

Pregnancy disability leave may be taken intermittently or on a reduced leave schedule when medically advisable, as determined by the employee's healthcare provider.

If an employee needs intermittent leave or leave on a reduced schedule that is foreseeable based on planned medical treatment, the employee may be transferred temporarily to an available alternative position for which the employee is qualified, which has equivalent pay and benefits that better accommodates recurring periods of leave than the employee's regular position.

In most cases, the School will respond to a pregnancy disability leave request within two (2) days of acquiring knowledge that the leave qualifies as pregnancy disability and, in any event, within ten (10) days of receiving the request. If a pregnancy disability leave request is granted, the School will notify the employee in writing and leave will be counted against the employee's pregnancy disability leave entitlement. This notice will explain the employee's obligations and the consequences of failing to satisfy them.

5. Return to Work

An employee on pregnancy disability leave remains an employee of the School and a leave will not constitute a break in service. When an employee returns from pregnancy disability leave, the employee will return to their original job or an equivalent job with equivalent pay, benefits, and other employment terms and conditions as when the leave commenced.

If the employee is not reinstated to the original position, the employee will be reinstated to a comparable position unless there is no comparable position available or a comparable position is available, but filling that position with the returning employee would substantially undermine the School's ability to operate the business safely and efficiently. A "comparable" position is a position that involves the same or similar duties and responsibilities and is virtually identical to the employee's original position in terms of pay, benefits, and working conditions.

6. Employment During Leave

An employee on pregnancy disability leave may not accept employment with any other employer without the School's written permission. An employee who accepts such employment will be deemed to have resigned from employment with the School.

7. Lactation Accommodation

The School will provide a lactation break for a reasonable amount of time to accommodate an employee's need to express breast milk. Employees in need of lactation breaks should contact their supervisor and human resources to allow for the School to determine a private space and ensure the reasonable time for breaks is provided. Human

Resources and the supervisor will assist the employee in identifying a proper location that is close to the employee's work area, shielded from view, and free from intrusion. Additionally, where applicable, the School will provide access to a sink with running water and a refrigerator for storing breast milk.

The lactation break shall, if possible, run concurrently with any rest break or meal period already provided to the employee. For non-exempt staff, any additional time needed to express milk outside of the normal rest break and meal period is to be off the clock. If the employee needs additional time past the breaks typically provided in a day, the employee should contact their supervisor and human resources. If a space and break is not provided when requested, please contact human resources.

E. Family and Medical Leave Act (FMLA) and California Family Rights Act (CFRA)

The School complies with the federal Family and Medical Leave Act ("FMLA") and the California Family Rights Act ("CFRA"). The following information provides employees with a general description of their FMLA and CFRA rights.

Calculating 12-Month Period for FMLA and CFRA

For purposes of calculating the 12-month period during which 12 weeks CFRA or qualifying exigency leaves may be taken, the School uses the "rolling" method also known as the look back method. For example, if an employee begins their leave on March 5, the look back period is 12 months from that date.

Under some circumstances, leave under FMLA and CFRA may run at the same time and the eligible employee will be entitled to a total of 12 weeks of family and medical leave in the designated 12-month period. Accrued sick leave will be paid to the employee starting with the first day of absence until exhausted and will run concurrently with FMLA and/or CFRA leave.

For leave to care for a covered service member, the 12-month period begins on the first day of the leave, regardless of how the 12-month period is calculated for other leaves. Leave to care for a covered service member is for a maximum of 26 workweeks during a 12-month period.

Leave granted under any of the reasons provided by state and federal law will be counted as FMLA and/or CFRA leave and will be considered as part of the 12-workweek entitlement (26-work week entitlement if leave is to care for a service member) in a 12-month period. The 12-month period is measured forward from the date any employee's first FMLA/CFRA leave begins. Successive 12-month periods commence on the date of an employee's first use of such leave after the preceding 12-month period has

ended. No carryover of unused leave from one 12-month period to the next 12-month period is permitted.

Pregnancy, Childbirth or Related Conditions Under FMLA, CFRA and PDL

Time off due to pregnancy disability, childbirth or related medical condition falls under pregnancy disability leave (PDL) and FMLA leave and is not concurrent with CFRA leave. Employees who may not be eligible for FMLA leave may still be eligible for leave under PDL. Once the pregnant employee is no longer disabled, or once the employee has exhausted PDL and has given birth, they may apply for leave under CFRA, for purposes of baby bonding.

1) Family Medical Leave Act

Employee Eligibility Criteria

FMLA leave provides up to 12 workweeks of unpaid, job protected leave within a 12-month period, under the following conditions:

- The employee must have been employed by the School for at least twelve (12) months,
- The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and
- The employee is employed at a location where the School has at least fifty (50) employees within a seventy-five (75) mile radius, except for purposes of baby-bonding where the threshold is twenty (20) employees.

FMLA leave may be taken for one or more of the following reasons:

1. The birth of the employee's child, or placement of a child with the employee for adoption or foster care. When both parents are employed by the School, and request simultaneous leave for the birth or placement for adoption or foster care of a child, the School will not grant more than a total of 12 workweeks of FMLA leave for this reason.
2. Due to the employee's own serious health condition causing the employee to be unable to perform one or more of the essential functions of their job. This excludes a disability caused by pregnancy, childbirth, or related medical conditions, as they are covered by the School's pregnancy disability policy.
3. To care for the employee's family member including a spouse, registered domestic partner, child, or parent who has a serious health condition or military service-related injury. When an employee is providing care for an injured spouse, child, parent, or next of kin who is a covered Armed Forces service member, the employee may take a maximum of twenty-six (26) weeks of FMLA leave in a single twelve (12) month period.

Intermittent Leave under FMLA

Full-time employees may take leave of up to 12 workweeks in a rolling 12-month period. Part-time employees may take leave on a proportional basis. The leave does not need to be taken in one continuous period of time. Under FMLA, the employee must have the School's agreement to take intermittent leave.

2) California Family Rights Act

The Fair Employment and Housing Act (FEHA), enforced by the Department of Fair Employment and Housing (DFEH), contains family care and medical leave provisions for California employees. CFRA applies to all employees of the state of California and any other political or civil subdivision of the state and cities, regardless of the number of employees.

Employee Eligibility Criteria

CFRA leave provides up to 12 workweeks of unpaid, job protected leave within a 12-month period, under the following conditions:

- The employee has more than 12 months of service.
- The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and
- The employee is employed at a worksite where there are 5 or more employees within a 75 mile radius.

CFRA leave may be taken for one or more of the following reasons:

1. The birth of the employee's child, or placement of a child with the employee for adoption or foster care. If the School employs both parents of a child, it will grant up to 12 weeks of leave to each employee.
2. To care for the employee's parent, parent-in-law, spouse, registered domestic partner, child, grandparent, grandchild, and sibling who has a serious health condition.
3. For a serious health condition that renders the employee unable to perform their job.
4. To care for the employee's family member including a spouse, registered domestic partner, child, or parent who has a military service-related injury. When an employee is providing care for an injured spouse, child, parent, or next of kin who is a covered Armed Forces service member, the employee may take a maximum of twenty-six (26) weeks of CFRA leave in a single twelve (12) month period.

Intermittent Leave under CFRA

Full-time employees may take leave of up to 12 workweeks in a rolling 12-month period. Part-time employees may take leave on a proportional basis. The leave does not need to be taken in one continuous period of time. Employees do not need the School's

agreement to take intermittent bonding leave. In the case of intermittent leave, the employee may be required to use such leave in two-week minimum increments, with an exception for shorter increments on at least two occasions.

3) Process for Requesting FMLA/CFRA Leave

Leave Procedures

The following procedures shall apply when an employee requests leave:

The employee must contact HR as soon as the need for the leave is realized.

If the leave is based on the expected birth, placement for adoption or foster care, or planned medical treatment for a serious health condition of the employee or an eligible family member per FMLA or CFRA, the employee must notify the School at least 30 days before the leave is to begin. The employee must consult with their supervisor regarding scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of the School. Any such scheduling is subject to the approval of the health care provider of the employee or the health care provider of the applicable family members.

If the employee cannot provide 30 days' notice, the School must be informed as soon as is practical. Notice can be written or verbal and should include the timing and the anticipated duration of the leave, but the School does not require disclosure of an underlying diagnosis. The School will respond to a leave request within 5 business days. The School requires written communication from the health-care provider stating the reason for the leave and the probable duration of the condition. However, the health care provider may not disclose the underlying diagnosis without the consent of the patient.

If the FMLA/CFRA leave request is made because of the employee's own serious health condition, the School may require, at its expense, a second opinion from a health care provider that the School chooses. The health care provider designated to give a second opinion will not be one who is employed on a regular basis by the School.

If the second opinion differs from the first opinion, the School may require, at its expense, the employee to obtain the opinion of a third health care provider designated or approved jointly by the employer and the employee. The opinion of the third health care provider shall be considered final and binding on the School and the employee. While waiting for a second or third opinion, the employee is provisionally entitled to FMLA/CFRA leave.

The School requires the employee to provide certification within 15 days of any request

for FMLA/CFRA, unless it is not practicable to do so. The School may require recertification from the health care provider if additional leave is required. For example, if an employee needs two weeks of family and medical leave, but following the two weeks needs intermittent leave, a new medical certification will be requested and required. If the employee does not provide medical certification in a timely manner to substantiate the need for leave, the School may delay approval of the leave, or continuation thereof, until certification is received. If certification is never received, the leave may not be considered family and medical leave.

If the leave is needed to care for approved family members per FMLA/CFRA, the employee must provide a certification from the health care provider stating:

1. Date of commencement of the serious health condition;
2. Probable duration of the condition;
3. Estimated amount of time for care by the health care provider; and
4. Confirmation that the serious health condition warrants the participation of the employee.

Certification

If an employee cites their own serious health condition as a reason for leave, the employee must provide a certification from the health care provider stating:

- 1) Date of commencement of the serious health condition;
- 2) Probable duration of the condition; and
- 3) Inability of the employee to work at all or perform any one or more of the essential functions of their position because of the serious health condition.

The School will require certification by the employee's health care provider that the employee is fit to return to their job. Failure to provide certification by the health care provider of the employee's fitness to return to work may result in denial of reinstatement for the employee until the certificate is obtained.

4) Pay and Benefits Under FMLA/CFRA

Health and Benefit Plans

The School provides health benefits under a group plan, and will therefore continue to make these benefits available during the leave if the employee is enrolled in the group plan. An employee taking FMLA/CFRA leave will be allowed to continue participating in any health and welfare benefit plans in which they were enrolled before the first day of the leave (for a maximum of 12 work weeks, or 26 workweeks if the leave is to care for a covered service member) at the level and under the conditions of coverage as if the

employee had continued in employment for the duration of such leave. The School will continue to make the same premium contribution as if the employee had continued working. The continued participation in health benefits begins on the date leave first begins. In some instances, the School may recover from employee premiums paid to maintain health coverage if the employee fails to return to work following family/medical leave. An employee is deemed to have “failed to return from leave” if they do not return following the leave of absence, or work less than thirty (30) days after returning from leave. Employees on pregnancy disability leave will be allowed to continue to participate in group health coverage for up to a maximum of four months (or for the approved time) of pregnancy disability leave (if such insurance was provided before the leave was taken) on the same terms as if the employee had continued to work. The employee will also continue to make premium payments, if applicable, based on the payment schedule outlined in the premium payment letter. They will then be able to remain on benefits for any time taken under approved FMLA/CFRA leave if they are eligible for those leaves. Payment is due when it would be made by payroll deduction.

Substitution of Paid Leave

Generally, FMLA/CFRA leave is unpaid. The School is not required to pay employees during FMLA/CFRA leave and may require an employee to use accrued vacation time or other accumulated paid leave other than sick time. If the FMLA/CFRA leave is for the employee’s own serious health condition the use of sick time is required and will run concurrent with FMLA/CFRA leave.

Time Accrual

Sick pay will accrue during any period of unpaid disability leave only until the end of the month in which the unpaid leave began. For example, an employee who delivers their baby on March 5 and goes out on leave on that date, would earn one day of sick leave for the month of March. Accrual for leave would be suspended until the employee returns from leave. All sick leave will be applied starting with the first day of absence until the leave is exhausted.

COBRA Benefits

If an employee requires additional leave after all protected leaves have been exhausted (PDL, FMLA, CFRA), they will be eligible for continued benefits through COBRA.

5) Reinstatement Upon Return From FMLA/CFRA

Under most circumstances, upon return from FMLA/CFRA leave, an employee will be reinstated to their original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. However, an employee has no greater right to

reinstatement than if they had been continuously employed rather than on leave. For example, if an employee on FMLA/CFRA leave would have been laid off had they not gone on leave, or if the employee's job is eliminated during the leave and no equivalent or comparable job is available, then the employee would not be entitled to reinstatement. In addition, an employee's use of FMLA/CFRA leave will not result in the loss of any employment benefit that the employee earned before using family/medical leave.

Reinstatement after FMLA leave may be denied to certain salaried "key" employees under the following conditions:

- 1) An employee requesting reinstatement was among the highest-paid 10 percent of salaried employees employed within 75 miles of the work site at which the employee worked at the time of the leave request;
- 2) The refusal to reinstate is necessary because reinstatement would cause substantial and grievous economic injury to the School's operations;
- 3) The employee is notified of the School's intent to refuse reinstatement at the time the School determines the refusal is necessary; and
- 4) If leave has already begun, the School gives the employee a reasonable opportunity to return to work following the notice described previously.

Under CFRA, the School will reinstate "key" employees.

Employees should contact HR for additional information about eligibility for FMLA, CFRA or PFL.

F. Bereavement Leave

The School grants leave of absence to benefited employees (employees with at least 50% employment) in the event of the death of the employee's current spouse, child, parent, parents-in-law, legal guardian, brother, sister, grandparent, grandchild, or mother, father, sister, brother, son-in-law, or daughter-in-law, step-parents, foster parents, foster children, and domestic partners. An employee with a death in the family may take up to five (5) consecutive scheduled work days off with pay with the approval of the supervisor. In the event services are located out-of-state, the allowed time off will be seven (7) days. An employee may be granted up to ten (10) days of bereavement leave for the death of the employee's spouse/domestic partner or child.

Bereavement leave may be taken intermittently with prior approval of the supervisor in no less than four hour increments. If an employee requires more than the allocated time off for bereavement leave, the employee may use accumulated sick days. The CEO or designee may approve additional unpaid time off.

G. Military Leave

Regular full time employees requiring a leave of absence for service in the uniformed services are provided leave and will be re-employed at the end of the leave. Policies governing this leave are designed according to the Uniformed Services Employment and Reemployment Rights Act and applicable state regulations. The policy covers those employees who enter active military duty voluntarily and extends to Reservists and National Guard members who are called to limited active duty or extended training duty, including regularly scheduled annual training and military summer camp training.

Eligibility

All employees, except those hired on a temporary or seasonal basis, are eligible for the leave.

Length of Leave

The length of the military leave is determined by the uniformed service organization calling the employee to active duty or military encampment.

Request Procedure

The employee must provide written notice of their obligation or intention to perform service in the uniformed services, unless notice is precluded by military necessity or is otherwise unreasonable or impossible. A copy of the military orders must also be provided. Failure to do so may result in loss of reemployment rights.

Pay While on Leave

Military leaves are without pay.

Status of Benefits

Reservists, National Guard members, and veterans returning from military service in the Armed Forces have and retain rights with respect to seniority, vacation, compensation, length of service, pay increases, as may be from time to time provided by applicable statutes of the United States and the state of California. The employee may maintain health care insurance benefits for up to 24 months while on leave by paying the insurance premiums through COBRA for any leave extending beyond 30 days.

Reinstatement

Upon return from a Uniformed Service Leave, the employee must report to work or request reemployment within prescribed time limits, which are based on the length of the leave:

1. Between one (1) to thirty (30) days: The service member is expected to report to

work on the first regularly scheduled work period on the first full day after release from service and will be reinstated to the same position held at the time the service leave began.

2. Between 31-180 days: The service member must submit an application for reemployment within 14 days of release from service.
3. For 181 days or longer: An application for reemployment must be submitted within 90 days of release from service.

Failure to file an application within the required time period may forfeit the right to reemployment.

H. Organ and Bone Marrow Donation Leave

The Organ and Bone Marrow Donation Leave grants up to 30 days leave of absence with pay to employees who have exhausted all available sick leave within a one-year period for the purpose of donating an organ and a five (5) day leave of absence with pay to employees who are bone marrow donors. If needed, employees may take an additional unpaid leave of absence, up to 30 days per year, for donating an organ.

This leave may require use of two weeks accrued paid time off for organ donation, and five (5) days for bone marrow donation.

A medical note will be required to be submitted. Medical benefits will be maintained while the staff member is on leave and the staff member is guaranteed reinstatement to work. There will be no discrimination or retaliation for any leave taken.

I. Jury Duty and Witness Leave

The School encourages employees to serve on jury duty when called. Postponement to non-instructional or off-peak department times is encouraged in order to minimize the impact to the School.

Seasonal and part-time employees will be provided unpaid time off to participate in jury duty. Nonexempt employees will receive full pay while serving up to 5 days of jury leave. Exempt employees called for jury duty will receive full salary for the time spent; however, exempt employees are expected to arrange their work schedule to minimize the impact on the School and must consult with their supervisor for guidance.

The employee should notify HR and their supervisor of the need for time off for jury duty as soon as a notice or summons from the court is received. Any employee summoned for jury duty must provide HR with an authentic summons, subpoena, or notice for such duty and upon returning to work must present proof of jury duty service, including the dates of the employee's service. Employees are expected to return to work if they are excused for jury duty during their regular working hours.

Fees Paid by the Court - All jury fees (excluding mileage) received by the employee while on school paid status shall be remitted to HR. Jury fees received while on school unpaid status are retained by the employee.

J. Volunteer Firefighters, Reserve Police Officer or Emergency Rescue Personnel

No employee shall be disciplined for taking time off to perform emergency duty as a volunteer firefighter. If the employee is an official volunteer firefighter, a reserve police officer, or an emergency rescue personnel they must alert HR that it may be necessary to take time off due to emergency duty.

K. Victims of Domestic Violence Leave

Employees who are victims of domestic violence are eligible for unpaid leave regardless of whether any person is arrested, prosecuted, or convicted of committing a crime. This leave provides time off for employees who are victims of domestic violence, sexual assault, and stalking, as well as leave for employees who are the victims or related to victims of certain serious or violent felonies. Employees may use available and accrued sick leave. The employee may also take paid vacation if eligible. The employee may request leave if they are involved in a judicial action, such as obtaining restraining orders, appearing in court to obtain relief to ensure the health, safety or welfare, or that of their child.

The employee should provide notice and certification if they need to take leave under this policy. Certification may be sufficiently provided by any of the following:

1. A police report indicating that the employee was a victim of domestic violence.
2. A court order protecting or separating the employee from the perpetrator of an act of domestic violence, or other evidence from the court or prosecuting attorney that the employee appeared in court.
3. Documentation from a medical professional, domestic violence advocate, health-care provider, or counselor that the employee was undergoing treatment for physical or mental injuries or abuse resulting in victimization from an act of domestic violence.

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

L. Suspension of an Employee's Enrolled Child

If an employee who is the parent or guardian of a child facing suspension from school and is summoned to the school to discuss the matter, the employee should alert the CEO or designee as soon as possible before leaving work. In keeping with California Labor Code Section 230.7, no discriminatory action will be taken against an employee who takes time off for this purpose.

M. Recreational Activities and Programs

The School or its insurer will not be liable for payment of workers' compensation benefits for any injury that arises out of an employee's voluntary participation in any off-duty recreational, social, or athletic activity that is not part of the employee's work-related duties.

N. Workers' Compensation

The School, in accordance with state law, provides insurance coverage for employees in case of a work-related injury. The workers' compensation benefits provided to injured employees include:

- Medical care;
- Cash benefits, tax free, to replace lost wages; and
- Vocational rehabilitation to help qualified injured employees return to suitable employment.

To ensure that the employee receives any workers' compensation benefits to which they may be entitled, they will need to:

- Immediately report any work-related injury or illness to HR. If the employee believes the injury or illness is caused by their job and developed gradually, the report should be filed as soon as possible. Reporting promptly helps avoid problems and delays in receiving benefits, including medical care. If the employee does not report the injury within 30 days, they risk losing their right to receive workers' compensation benefits;
- Seek medical treatment and follow-up care if required;
- Complete a written claim form and return it to HR as soon as possible.
- Provide the School with a certification from the healthcare provider regarding the

need for workers' compensation disability leave, as well as the eventual ability to return to work from the leave.

Upon submission of a medical certification that an employee is able to return to work after a workers' compensation leave, the employee under most circumstances will be reinstated to the same position held at the time the leave began, or to an equivalent position, if available. Upon return, a teacher is not guaranteed the same students, but will receive new/transfer students according to the same seniority status they had prior to the leave. An employee returning from a workers' compensation leave has no greater right to reinstatement than if the employee had been continuously employed rather than on leave. For example, if an employee on workers' compensation leave would have been laid off had they not gone on leave, or if the employee's position has been eliminated or filled in order to avoid undermining the School's ability to operate safely and efficiently during the leave, and no equivalent or comparable positions are available, then the employee would not be entitled to reinstatement.

An employee's return depends on their qualifications for any existing openings. If, after returning from a workers' compensation disability leave, an employee is unable to perform the essential functions of the job because of a physical or mental disability, the School's obligations to the employee may include reasonable accommodation, as governed by the ADA (Americans with Disabilities Act).

O. Other Types of Leaves

There are other types of leaves that employees may be eligible for which include:

- Time off to visit children's schools: This leave provides employees up to 8 hours per month (to a maximum of 40 hours per year) of unpaid time off for the purpose of child-related activities which include: to find, enroll, or re-enroll the child in a school or with a licensed childcare provider; to participate in activities of the school or licensed child care provider; to address a child care provider or school emergency. Employees may use available and accrued sick leave;
- Literacy accommodation leave: This leave provides reasonable accommodation for employees who experience difficulties with literacy to enroll in an adult literacy program, work with a tutor or otherwise take steps to improve upon their literacy needs. Employees may use available and accrued sick leave;
- Military spousal leave: This leave provides employees up to 10 days of unpaid, protected leave, to spend time with a spouse or registered domestic partner who is home during a period of military deployment.

P. Professional Development

The School expects all employees to maintain necessary certifications and encourages all employees to attend meetings, conferences, and other educational sessions that provide training and ideas helpful to the development or operation of the School. Employee requests to attend short-term professional development opportunities (two days or less) not sponsored by the School are subject to the approval of the Executive Director, CEO or designee.

Employees will be allowed with the approval of their supervisor and the CEO or designee to attend extended professional development programs. Extended professional development programs are considered more than two (2) days. An employee will be expected to complete missed work or assignments upon return.

Employees should submit written requests to take professional development days to their supervisors for approval. The request shall include a printed or written agenda and/or printed material pertaining to the professional development. The School requests that employees submit requests to take professional development days at least 10 days for in town events and at least 30 days for out of town events. The granting of request will be solely at the discretion of the Executive Director or CEO.

Q. Holidays

The School recognizes the following holidays:

- New Year's Day (January 1st)
- Martin Luther King Jr's Birthday
- Presidents' Day
- Memorial Day
- Juneteenth (June 19th)
- Independence Day (July 4th)
- Labor Day
- Veterans Day
- Thanksgiving Day
- The Friday after Thanksgiving
- Christmas Eve (December 24th)
- Christmas Day (December 25th)
- New Year's Eve (December 31st)

Each year the winter break will be reviewed and the holidays determined by the beginning of the school year.

Unless otherwise provided in this policy, all employees will receive time off for each observed holiday. To qualify for holiday pay, an employee must be a regular full time (thirty or more hours per week) classified employee in paid status on the working day immediately preceding or following the holiday. A holiday that falls during a classified

employee’s vacation time or sick time is paid as a holiday and is not deducted from vacation or sick-leave balances.

R. Vacation (Classified Employees)

The School’s vacation policy is intended to provide eligible classified employees with time away from work for relaxation and renewal. In order to be eligible for vacation accrual, an employee must be a full time (thirty or more hours per week) classified exempt or nonexempt employee.

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

Vacation Accrual <i>Classified Staff</i>					
	Full Time Equivalent (FTE)	Hours Worked Per Week	Non-Exempt: Per Semi Monthly Pay Period	Exempt: Per Pay Monthly Period	Total Sick Hours Accrued Per Month
Full Time	.75+	30+	4 hours/4 hours	8 hours	8 hours
Part Time	.475-.74	20-29	3 hours/ 3 hours	6 hours	6 hours
Part Time	.475 or less	19 or less	not eligible	not eligible	not eligible

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

Employees may be required to use their earned vacation hours during school recess.

Vacation can be used in increments of 1 hour and only used from the employee's available accrual. Vacation hours cannot be advanced ahead of the earned accrual. Accrued and unused vacation hours will roll over from year to year but are capped at one and a half times the annual rate of accrual. Employees will not accrue any additional vacation until their balance has dropped below the annual cap.

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

S. Work Year Calendars

Each year the Board of Directors will approve the instructional and work year calendars for the new school year. Specific work days for certificated staff are determined by the School based on a return date for prep days, professional development, and final date for grade submission. The work days will be designated within the date range listed on the employment agreement.

In coordination with HR, supervisors will prepare a work year calendar displaying the first and last day of the assignment, all recess periods, and designated non-work days. For employees working less than 12 months, non-work days will be determined at the discretion of the employer, indicated on a work calendar provided to the employee, and determined so that work schedules will provide the greatest support to the School or department.

Non-work days are unpaid days based upon the employee's position and employment agreement as stated on the work year calendar. Unlike accrued leave, non-work days will not carry over from year to year.

T. Make-up Time

Nonexempt employees may choose to use make up time in order to accommodate employee scheduling needs. Employees may choose to work over 8 hours on one or more days per week, so they make up work less than 8 hours another day for personal reasons. The extra hours worked for make-up time would not be counted as overtime. Employees are not to work more than 11 hours in a single work day (without prior approval), and the make up time must all be taken and used within the pay work week. If an employee requests make up time and has worked over 8 hours in a day earlier in the week, and their need for time off changes, the employer may still require the employee to take the planned time off to avoid unnecessary overtime. Unless otherwise approved, employees are not to work more than 40 hours per week, in which case, they will be eligible for overtime. Requests for make up time must be submitted to the supervisor in advance.

U. Suggestions

The School is always striving to improve operating procedures and encourages all employees to make suggestions to this end. We welcome suggestions on subjects such as safety; ways to improve customer service; and, how to save labor, money, energy, time, and materials. All suggestions should be submitted in writing to the appropriate supervisor who will in turn discuss them with School management. We appreciate staff suggestions that help make the School more successful.

Initial _____

Confirmation of Receipt of Handbook

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

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

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

Employee's Signature

Employee's Print Name

Date

**Excel
EACS September 2023 - TOR MANUAL REVISIONS**

Recommended for board approval to align with new provisions and update language for clarity

Section	Item
<p><u>Section:</u> Highlights of Policy Changes</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> Updated the TK timeframe policy for enrollment from September 2 - April 2 to September 2 - June 2.
<p><u>Section:</u> Staff Protocol for Crisis</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> Updated CORE Crisis team members and Supporting Members
<p><u>Sub-Section:</u> Engagement and Re-engagement Programs and Policies</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> Updated the live instruction schedule and classes offered.
<p><u>Section:</u> Discipline - PINs and BIPs</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> Removed the specific time frames for ToRs to issue PINs and updated it with a broader statement of: “If you feel that a parent or student has failed to comply with Excel Academy expectations and policies, please contact Erin Petersen (Elementary Coordinator) for TK-6th, Victoria Firetag (Secondary Coordinator) for 7th-12th grade students and Christa Nick (Virtual Path Coordinator) for Virtual Path students prior to issuing or threatening a PIN.”

<p><u>Section:</u> Personalized Pathway - Graduation Goals</p>	<p><i>Revised</i></p> <ul style="list-style-type: none">• Reworded the Graduation Goals section to include the requirement to meet with a School Counselor regardless of what graduation track the student is on.
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***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- **June 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

Pali Option			
Regional Event	Field Trips	Outdoor Classroom	Virtual Lessons

Community Liaison Option			
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)**
- **7th & 8th graders have a reduced requirement of 2 lessons TOTAL each week. Only Reading WIN= 2 Reading lessons, Reading & Math WIN= 1 reading lesson & 1 math lesson, etc**
- **Oral Fluency Assessments:** The Intervention Department will analyze student results below the 25%ile during each assessment period and communicate with ToRs, as needed. ToRs with concern regarding any assessment results or work samples are always encouraged to contact the Intervention Department.
- New SST leaders
 - **TK-6:** Tamara Murphy, tmurphy@excelacademy.education
 - **7-12:** Alison DeSchaine, adeschaine@excelacademy.education
- WIN Contact: Sarah Horikawa, shorikawa@excelacademy.education
 - INT Compliance CoCo: Carly Paulsen, Intervention@excelacademy.education

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

Supporting Members:

** These staff members will be contacted by the Core Crisis Team as deemed necessary**

Caroline Forester, Elementary Counselor: **(619) 786-8270**,

cforester@excelacademy.education

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

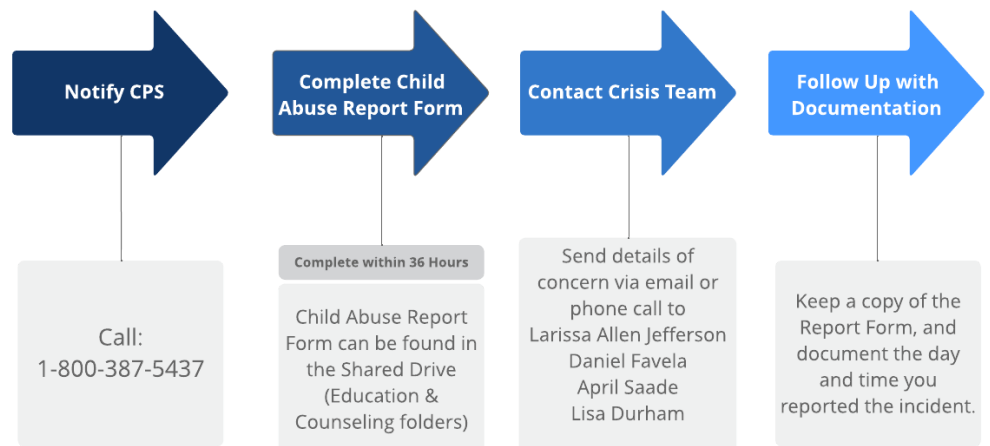
<https://www.crisistextline.org/>

CPS Protocol



CPS Protocol

In the event you witness, have knowledge of, or suspect any form of abuse occurring to a child at Excel Academy, please immediately follow the steps listed below.



[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 \$50+	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 repellent, 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.

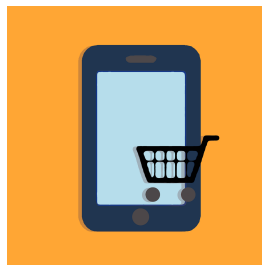
Cancellation Policy

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.

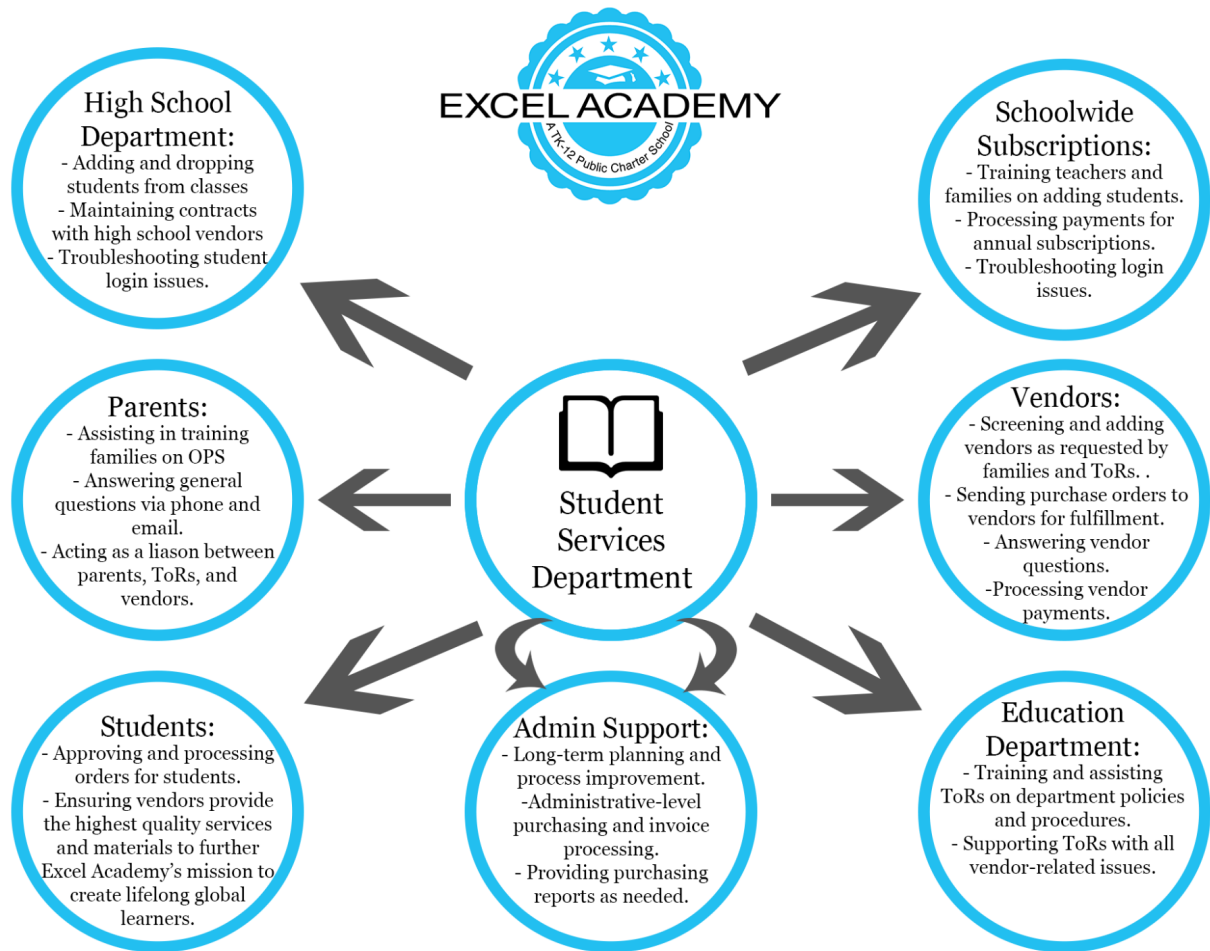
Disallowed Educational Activities

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:

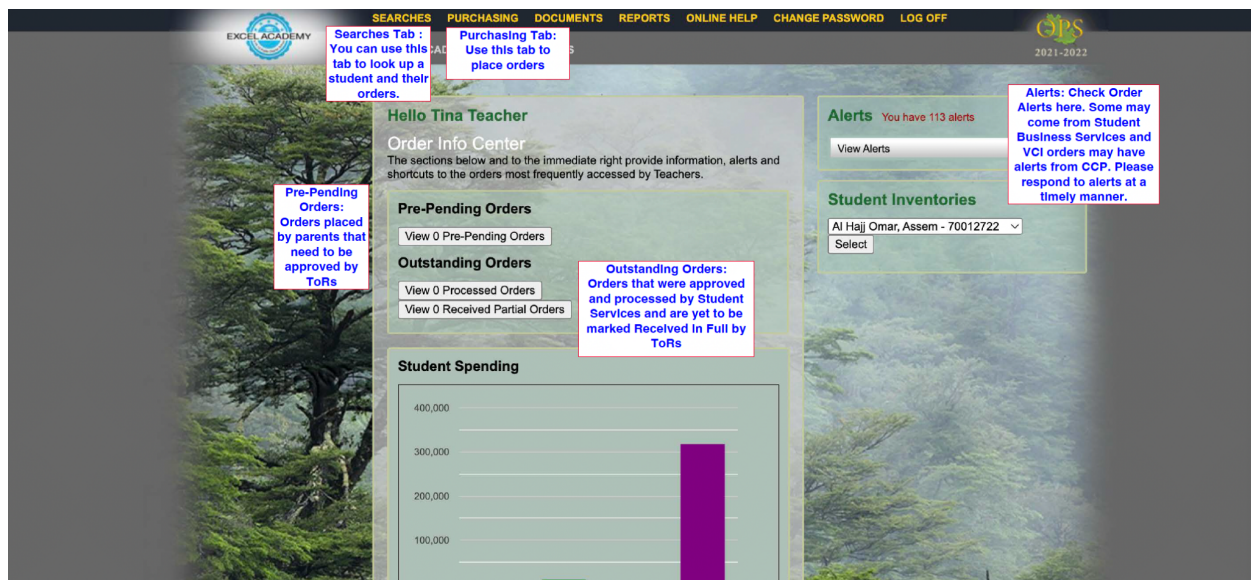
- 12 month subscriptions must be ordered between September and December 15.
- 6 month subscriptions can be ordered between December 15 and February 28.



- 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:

View site information **Rainbow Resource Center [P] (VENDOR NOTE: PLEASE Double check for religious materials! Especially LATIN & SCIENCE & HISTORY CURRICULUM! No-No List - Parachutes over 6ft. No Latin Primer, NO Visual Manna --i.e. Teaching History Through Art or Teaching English Through Art. No Latin Road to English Grammar, No Memoria Press, Apologia, Bob Jones University-Latin for Children-Classical Academic Press- Monarch, Ignitia, Switched-On Schoolhouse, Latins Not So Tough, LIFEPAK, The Weaver Curriculum, La Clase Divertida, Alpha Omega Science, Science in the Ancient World, Science in the Beginning, Memoria Press, Lift up your Eyes on High-Understanding the Stars, Climbing To Good English, Life of Fred books. Childs History of the World by V.M. Hillyer. Pathway Readers. Five-in-a-Row NOT VOL. 4 or the Christian character and Bible supplement. Grammar of Spelling ANY Learning Language Arts Through Literature or GREENLEAF PRESS MATERIALS NOT PERMITTED ie- Famous Men of the Renaissance and Reformation, etc. IEW Ancient History Based Writing Lessons and IEW Fables, Myths, and Fairy Tales Writing Lessons not permitted- No Homeschool In The Woods timeline books or curriculum, Notgrass America The Beautiful, Sign Language for Everyone, Singapore Math MUST be ordered through our Singapore Math vendor. Rainbow cant sell S.M. to Charter Schools - as per S.M.s request. Please check all Horizons items - some are not secular. Write shop ALLOWED items: WriteShop Primary Book A WriteShop Primary Book B WriteShop Primary Book C WriteShop Junior Book D WriteShop Junior Book E Blue Book of Grammar and Punctuation. YOU MUST ENTER THE 5 DIGIT RR NUMBER NOT THE ISBN NUMBER Reasons for Science)**

Category	Item	Description	Consumable	Qty	Cost	Total
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$

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](#)

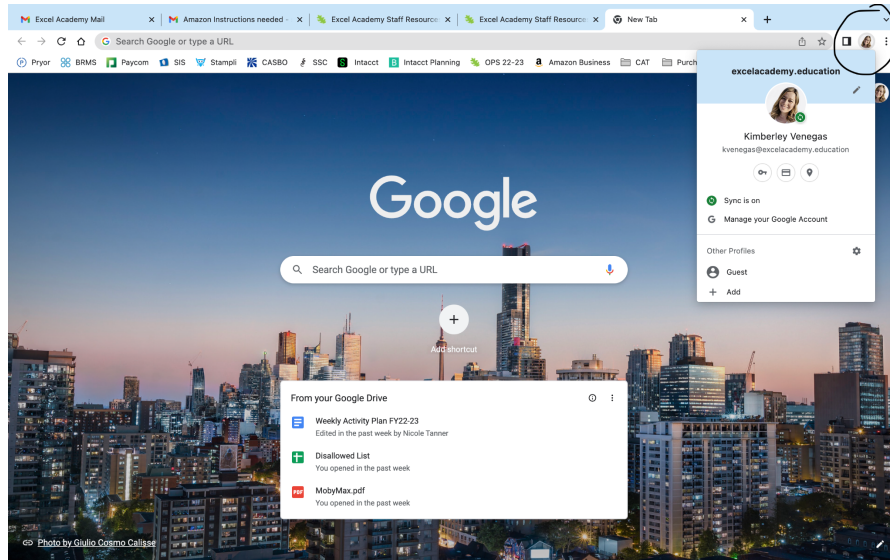
Student	Test Testson - Gr. emr		Order Notes:		Add Internal note View/Add PO note				
Available EU's	67.84								
Vendor	Rainbow Resource Center [F]								
PO Number	263210704 - Date Requested: 07-02-2019								
Order Type	EMR								
Order Status	Pending ▾ <input type="button" value="Update Order"/> <input type="button" value="Return To List"/>								
Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost	
1	Pending ▾	0000	TEST ITEM	Math ▾	<input checked="" type="checkbox"/>	1	1.00	1.00	
								Tax:	0.08
								Shipping:	15.00
Tax and shipping may change when invoice matched.								TOTAL:	16.08
<input type="button" value="Update Order"/> <input type="button" value="Return To List"/>									
Invoice Info:									
<input type="button" value="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.

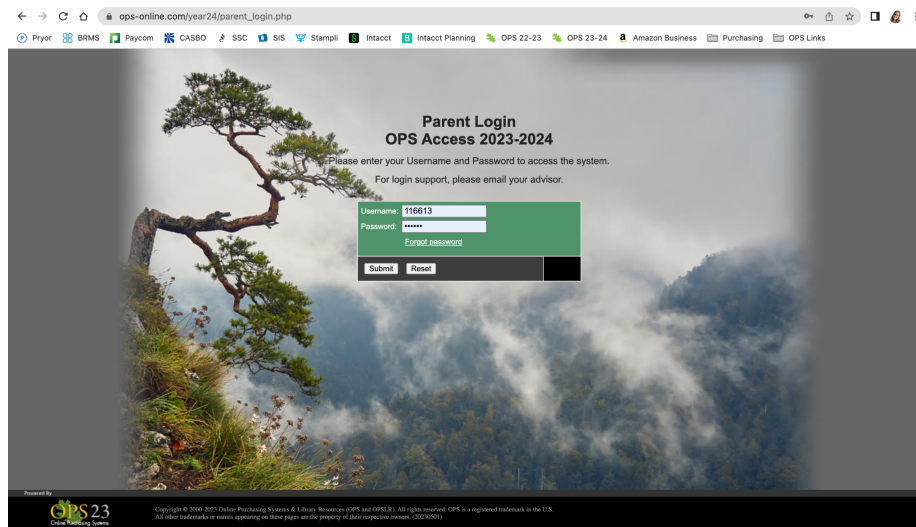
Once you have their email login credentials and OPS login information, please have them download Google Chrome and sign in to their Google Account in their web browser like it shows on this screenshot using their school email.



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](#)

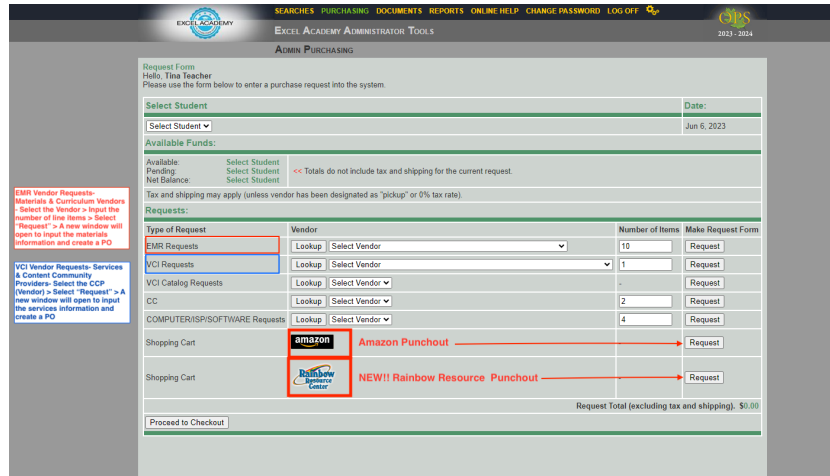
NEW!!! Rainbow Resource Punchout

1. Login to [OPS](#) portal.

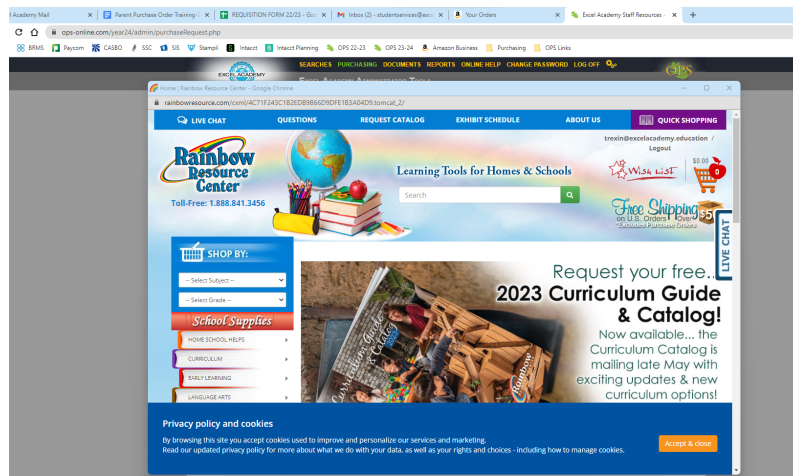
<https://www.ops-online.com/year24/excel/>

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."

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	
Available EU's	51.76	
Vendor	Rainbow Resource Center [P]	
PO Number	263210704 - Date Requested: 07-02-2019	
Order Type	EMR	
Order Status	<div style="border: 1px solid black; padding: 2px;"> Processed ▼ Processed Received Full Return To List Received Partial </div>	
Line#	Status	Item
1	Processed ▼	0000
Tax and shipping may change whe		
<input type="button" value="Update Order"/> <input type="button" value="Return To List"/>		
Invoice Info:		

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 ▼	<input checked="" type="checkbox"/>	1	10.00	10.00
2	Pre-pending ▼	40938	Toy	Multi-Subject ▼	<input type="checkbox"/>	1	50.00	50.00
3	Pre-pending ▼	54921	Math Book	Science ▼	<input type="checkbox"/>	1	15.00	15.00
4	Pre-pending ▼	32981	J	Office/School Supp ▼	<input type="checkbox"/>	1	0.00	0.00

Tax: 5.81

Shipping: 15.00

TOTAL: 95.81

Tax and shipping may change when invoice matched.

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.”

Pre-pending ▼

Update Order Return To List

Status	Item	Des
Pre-pending ▼	34092	Art Book
Pre-pending ▼	40938	Toy
Pre-pending	54921	Math Book
Canceled by Teacher	32981	J

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

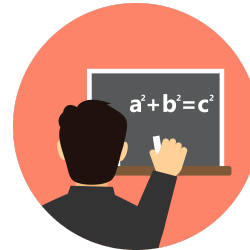
- These item descriptions are incomplete. All orders must have the full name of the product in order to be approved and processed. Full Description of items must be in the Description section.
- Line item 4 has an incomplete item description and price. Look up the item number on the Rainbow Resource 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		<< Totals do not include tax and shipping for the current request.	
Available:	\$955.95		
Pending:	\$144.05		
Net Balance:	\$955.95		
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.

Confirm Request		Delete Request			
VCI Requests - TEST VENDOR					
Remove	Category	Description	Month	Cost	Total
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	September	100.00	100.00
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	October	100.00	100.00
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	November	100.00	100.00
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	December	100.00	100.00
Update Order				Updated Total: 400.00	

Confirm Request Delete Request

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](#)

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:

Please enter a valid address to send this document to:

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

Email Subject:

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

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

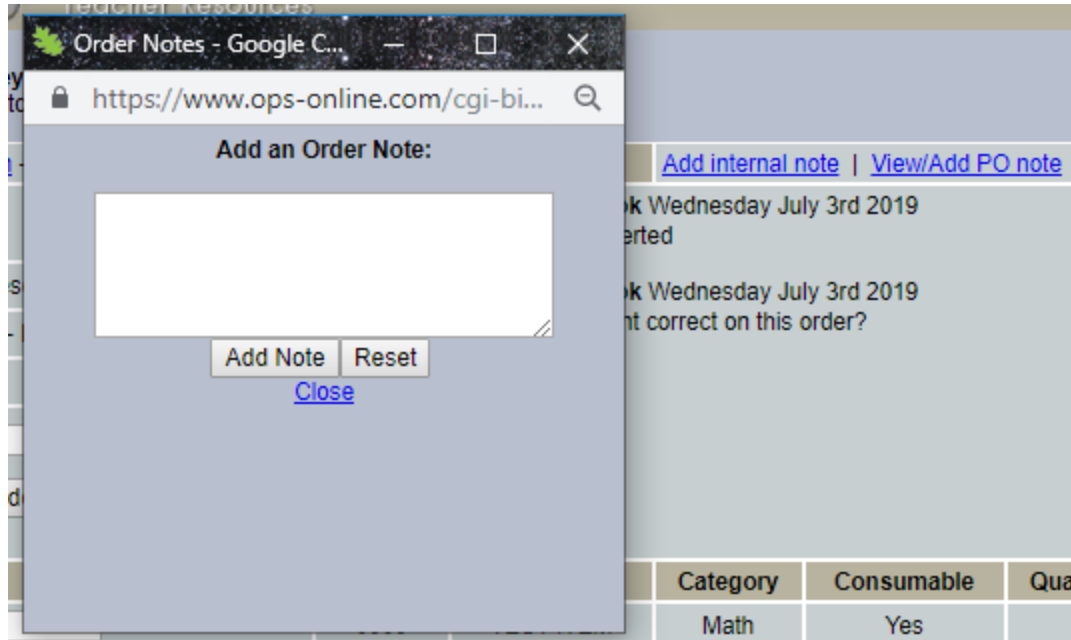
1. You can make an internal note when you first create the purchase order or you may search for the purchase order and add an internal note later. To find the order, please follow the instructions in the Searching for Orders section.
2. Then find the purchase order that needs the internal note and click 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](#)

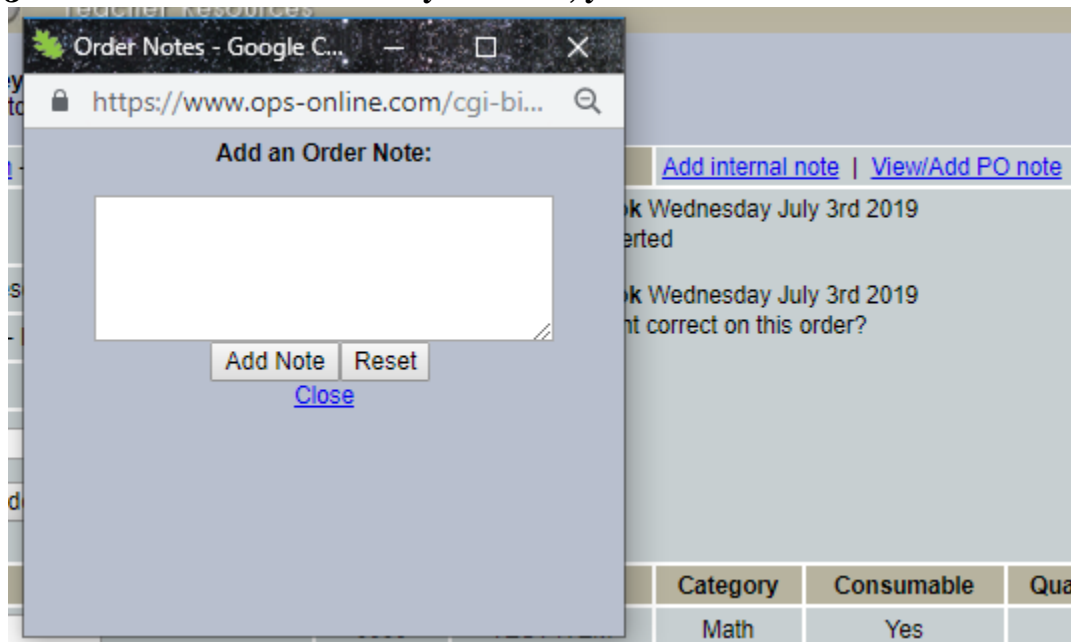
Student	Test Testson - Gr. emr	Order Notes:	Add internal note View/Add PO note						
Available EU's	555.95	Charles McCook Wednesday July 3rd 2019 Teacher was alerted Charles McCook Wednesday July 3rd 2019 Hi, is the amount correct on this order?							
Vendor	Rainbow Resource Center [P]								
PO Number	263210704 - Date Requested: 07-02-2019								
Order Type	EMR								
Order Status	Processed <input type="button" value="Update Order"/> <input type="button" value="Return To List"/>								
Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost	
1	Processed <input type="button" value="Update Order"/> <input type="button" value="Return To List"/>	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
<input type="button" value="Update Order"/> <input type="button" value="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 ...	Choose Status ▾ Search
Status:	Choose Type ▾
Type:	Select Vendor
Vendor:	
Select Student:	Select Student ▾ Select
P.O. Number:	Select Student Testson, Test - test 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: Choose Status ▾ Search

Type: Choose Type ▾

Vendor: Select Vendor

Select Student: Select Student ▾ Select

P.O. Number: Search

View Teacher Inventory:

View Student 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.”

Student Budget Transfer Request:	From Student <input type="text" value="▼"/> To Student <input type="text" value="▼"/> Amount: \$ <input type="text"/> <input type="button" value="Request Budget Transfer"/>
Funding Drop Request:	For Student <input type="text" value="▼"/> Amount: \$ <input type="text"/> <input type="button" value="Request Funding Drop"/>

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.

Community Collaborative Charter Schools
on behalf of Excel Academy
Transfer Funds from One Student to Another

Transfer \$10
From Test Testson - test (\$555.95)
To PAYMENT BATCH - 11 (\$0.00)

Manual adjustment notes to be added to both students:

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

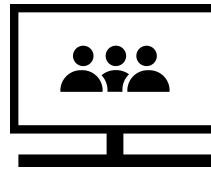
High School \$1,650 in August and \$1,650 in November

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.”

Orders	
Combination Search ...	Choose Status ▾ Search
Status:	Choose Type ▾
Type:	Select Vendor
Vendor:	
Select Student:	Select Student ▾ Select
P.O. Number:	<input type="text"/> Search
View Teacher Inventory:	View Teacher Inventory
View Student Inventory:	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 Stokley**Teacher
 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	<div style="border: 1px solid black; padding: 2px;"> Pre-pending ▼ Pre-pending Pending Canceled </div> 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](#).



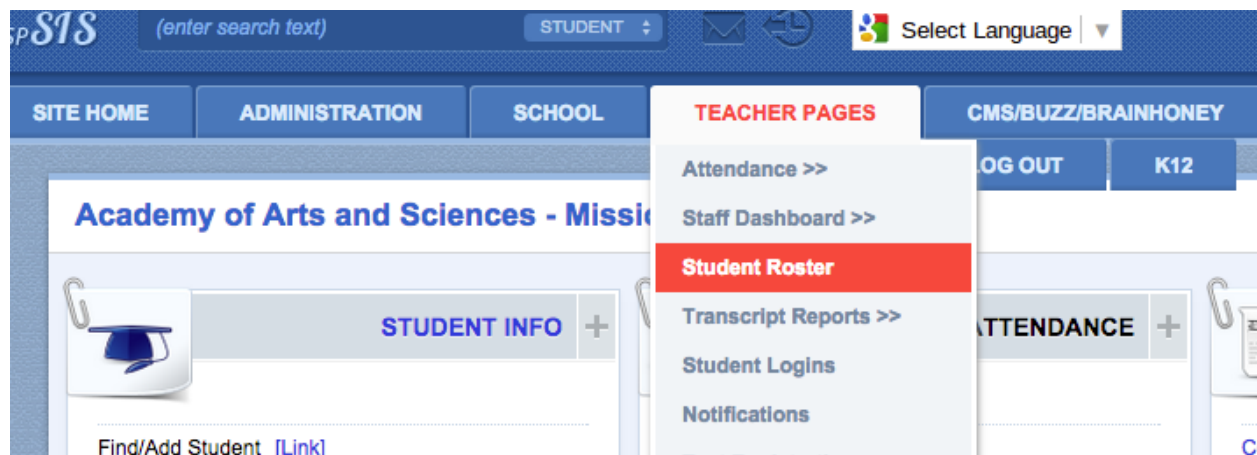
How to Access Student Roster in SIS

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	
<input type="checkbox"/>	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
<input type="checkbox"/>	2	▶	2575118788	10366	Crawford, Ezekiel	7	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	03/31/2004	Grad Data Send E-mail
<input type="checkbox"/>	3	▶	8638905058	10545	Crawford, Stephen	11	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	09/14/1999	Grad Data Send E-mail
<input type="checkbox"/>	4	▶	2631450925	10524	Hsu, Kaitlyn	10	C	15642 Sand Canyon Ave. #50506	Irvine	92619		08/02/2002	Grad Data Send E-mail
<input type="checkbox"/>	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
<input type="checkbox"/>	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
<input type="checkbox"/>	7	-		11635	Roberts, Raquel			73 Cottage Ln	Aliso Viejo	92656	(949) 374-0771	02/02/2002	Grad Data Send E-mail
<input type="checkbox"/>	8	▶		11442	Student, John	10	C	123 First Street	Vista	92081		01/01/2000	Grad Data Send E-mail
<input type="checkbox"/> 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

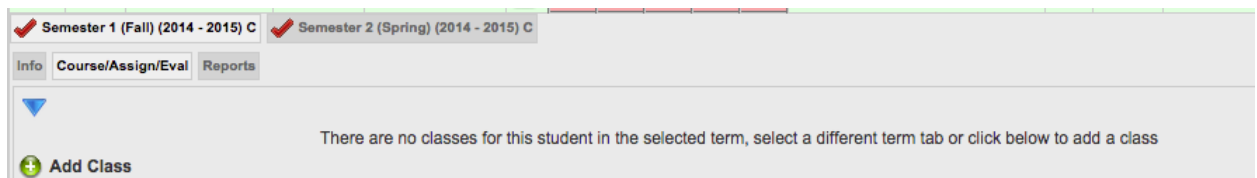
(High School and JH students taking high school-level courses only)

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.

Edit Class: [English 12 A](#)

Class Info | **Curriculum** | Merge | Reporting | CC Class To Students

Class Curricula

Local ID	Name	Owner	Category	Preview	Weight
<input checked="" type="checkbox"/> 1899	EXCEL CO - ENGLISH 12 [XL26] [1920]	Coon, Erika	Language Arts	View	33.33% 1
<input checked="" type="checkbox"/> 3818	CP English 12 A/B	Haas, Amanda	Language Arts	View	33.33% 1
<input checked="" type="checkbox"/> 2179	<input type="text"/> British Literature: Heroes, Monsters, Fairies, and Kings - Oak Meadow [1920]	Coon, Erika	Language Arts	View	33.33% 1

Add Curriculum Clear

Grade: Range: Category: Text Search:

Imported ID	Name	Owner	Category	View
<input checked="" type="checkbox"/> 2179	British Literature: Heroes, Monsters, Fairies, and Kings - Oak Meadow [1920]	Coon, Erika	Language Arts	View
<input type="checkbox"/> 2587	British Literature - Oak Meadow	Coon, Erika	Language Arts	View
<input type="checkbox"/> 2351	Oak Meadow English 9 [1920]	Coon, Erika	Language Arts	View
<input type="checkbox"/> 2808	Oak Meadow Literature and Composition II C. 2009	Hernandez, Amy	Language Arts	View

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.**

- 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. The teacher, parent, and student will all sign the addendum.

Please see the [High School 10-Day Add/Drop Deadline](#) for changing and adjusting curriculum before creating an addendum for high school students. Remember to **include a parent and the student for signature**.


Resources:

[How to create and save an addendum](#)

How to check Grid Logs for Engagement

How to check grid logs for a single student:

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



Learning Period	Attendance	Work Summary	AWR	Learning Logs
[1] 08/26/2021 - 09/17/2021				
[2] 09/20/2021 - 10/15/2021				
[3] 10/18/2021 - 11/12/2021				
[4] 11/15/2021 - 12/10/2021				
[5] 12/13/2021 - 01/14/2022				

- 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.
- 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).

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1						
LP: 2						
LP: 3						
LP: 4						
LP: 5						

Learning Period	Attendance	Work Summary	AWR	Learning Logs
[1] 08/26/2021 - 09/17/2021				
[2] 09/20/2021 - 10/15/2021				
[3] 10/18/2021 - 11/12/2021				
[4] 11/15/2021 - 12/10/2021				
[5] 12/13/2021 - 01/14/2022				

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

Schoolyear

2021 - 2022

Log Type

Grid Log - Check

Report Title

Student Learning Log

Select Learning Periods

Track: B LP 5 (15 days: 12/13/2021 - 0...

Print Signature Lines

Parent

Student

Teacher

Other Options

Hide Printed Calendar

Print In Landscape

Print Logs

Archive 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.)

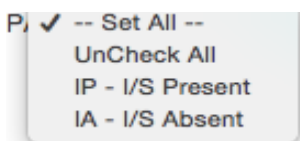
To do so, log into SIS, go to “Teacher Pages” and go to your student roster. Once there, go to the box located above your roster and click on the “Att” icon next to the correct learning period. (see below)

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1	<input checked="" type="checkbox"/>					
LP: 2	<input checked="" type="checkbox"/>					
LP: 3	<input checked="" type="checkbox"/>					
LP: 4	<input checked="" type="checkbox"/>					
LP: 5	<input checked="" type="checkbox"/>					

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 attendance. These 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.

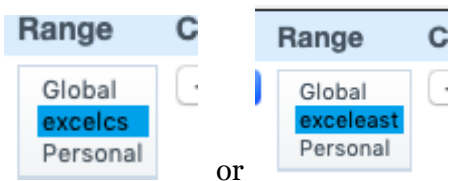
AWRS (Assignments and Work Record) must be completed before the beginning of each LP. This pre-loading of objectives and assignments will create a default pacing guide, and help hold the home educator accountable for progress. After meeting with families, the AWRs should be reviewed and/or adjusted to reflect the actual work completed and reflected in the body of work.

AWRs Fundamentals:

- Choose objectives/standards that were attempted and the assignments that correlate. Each 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).



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.


























The screenshot shows a grid of course sections for the 2020-2021 school year. The columns represent different subject areas: ELA, Foreign Language/WFLA, Government, Language Arts, Mathematics, and Physical Education. The rows represent individual classes. Handwritten annotations in red and grey boxes point to specific cells:

- Two arrows labeled "TK-8" point to Language Arts cells in the first two rows.
- An arrow labeled "8th grader w/ Span 1" points to the EDG Spanish 1 B cell.
- An arrow labeled "8th grader w Alg. 1" points to the CP Algebra 1 B cell.
- An arrow labeled "HS" points to the PE Elective B cell.
- Another arrow labeled "HS" points to the BT English 1 B cell.

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).

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1	<input checked="" type="checkbox"/>					
LP: 2	<input checked="" type="checkbox"/>					
LP: 3	<input checked="" type="checkbox"/>					
LP: 4	<input checked="" type="checkbox"/>					
LP: 5	<input checked="" type="checkbox"/>					

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

The screenshot shows the 'Sign and Archive electronically' interface in the School Pathways system. The page is divided into several sections:

- Signature Line:** Includes checkboxes for 'Teacher' (checked), 'Student', and 'Parent/Guardian'.
- Attendance Line:** Includes checkboxes for 'None', 'Acknowledgment of learning period days' (checked), and 'Acknowledgment of learning period days (By Hand)'.
- Other Options:** Includes checkboxes for 'Include all classes when printing for students' (checked), 'But don't include ADA classes', 'Don't group by Learning Period', 'Don't group by Curriculum', 'Show as Synopsis View', 'Show All Curriculum', and 'Text Font Size (0-10)'.
- Assignments:** Includes checkboxes for 'Show Assigned Date', 'Show Due Date', 'Show Grade Given', 'Show Curriculum Grade (must be grouped by curriculum)', 'Show Assignment Grade', 'Show items given no weight', 'Hide past-due', and 'Show Only Completed'.
- Learning Period Range:** Includes a dropdown for 'School Track: B' and radio buttons for learning periods 1 through 9, with '1' selected.
- Show Assignment Types:** Includes checkboxes for 'Assignment' (checked), 'Objective' (checked), 'Standard' (checked), 'Module' (checked), and 'Resource' (checked).
- Buttons:** 'Back', 'Preview', and 'Print' buttons are located below the settings.
- Student Selection:** A table with columns 'Select' and 'Student Name'. The 'Select' column has checkboxes for 'Cardona, Brayden', 'Salaiz, Faith', and 'Salaiz, Grace', all of which are checked. There is also an 'All' option.

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.

Attendance Forms	
Form #2a0 - LP 1, Track B	
Verified	Archived
21 Student(s)	
[View]	[Edit]

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?

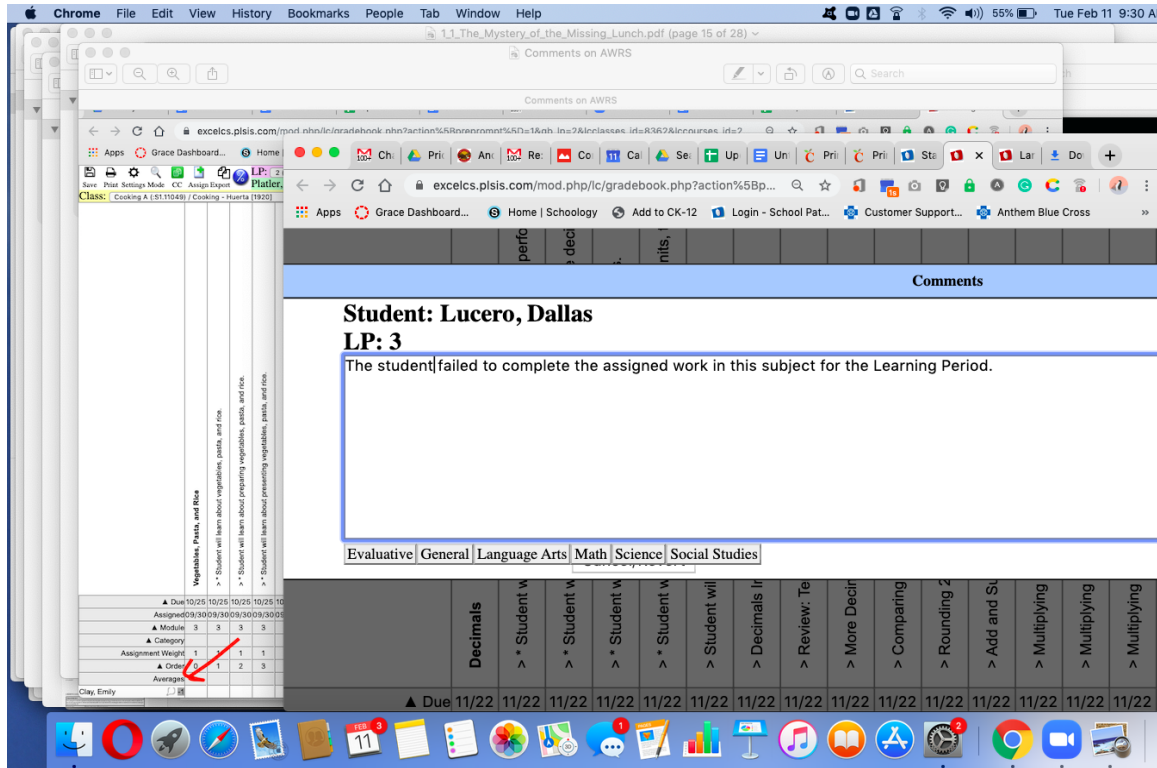
A: The report card should include a line about why the grade was lowered. Ex: Student only completed 20% of work, resulting in a lower grade and/or failing of the course.

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.



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.

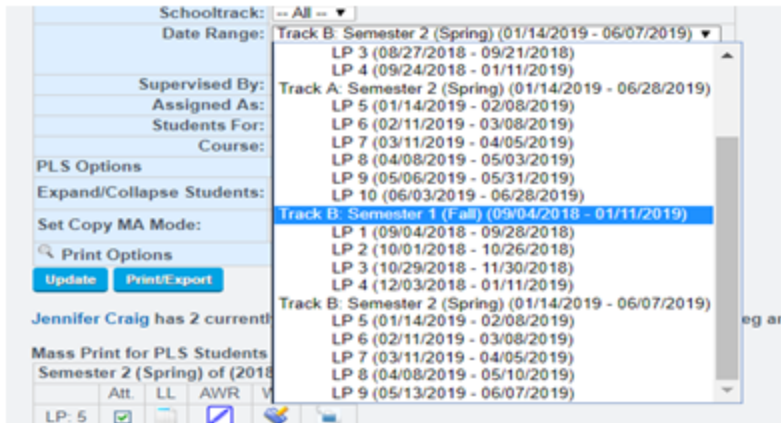


Report Cards in SIS

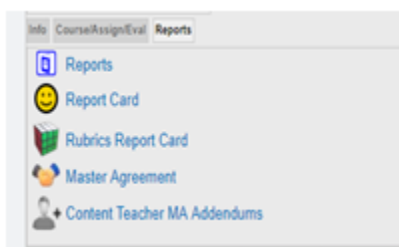
*****Please refer to the shared report card folder for pertinent information and specific details.**

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.*)



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



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

Class Information	Semester 1 (Fall)			Hide			Hide All Terms Click All
	Computed Grade	Override Compute	Comments	Class	Teacher	Print	
Language Arts (1000-SEA.91.12795) PLS Status: Not Priced Teacher: Craig Jennifer	-	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mathematics (1000-SEA.91.12796) PLS Status: Not Priced Teacher: Craig Jennifer	-	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Science (1000-TEA.91.12795) PLS Status: Not Priced Teacher: Craig Jennifer	-	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Studies (1000-JEA.91.12796) PLS Status: Not Priced Teacher: Craig Jennifer	-	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Education (1000-TEA.91.12796) PLS Status: Not Priced Teacher: Craig Jennifer	-	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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*.
- 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.

Class Information	Computed Grade	Override	Comments	Class	Teacher	Print	Check All
Language Arts (1000-3EA.S1.1270) PLS Status: In Progress Teacher: Craig, Jennifer	-	3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mathematics (1000-7EA.S1.1270) PLS Status: In Progress Teacher: Craig, Jennifer	-	3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Science (1000-17EA.S1.1270) PLS Status: In Progress Teacher: Craig, Jennifer	-	2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social Studies (1000-7EA.S1.1270) PLS Status: In Progress Teacher: Craig, Jennifer	-	3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Education (1000-7EA.S1.1270) PLS Status: In Progress Teacher: Craig, Jennifer	-	1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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		Computed Grade	Semester 1 (Fall)		Comments	Teacher
	Credits	Override		Override	Credits		
Dance 2 A (2355-3EA.S1.1230) PLS Status: In Progress Teacher: Mashburn, Mandy	5		-	A	5		<input type="checkbox"/>
EDG: Chemistry w/Lab A (2607-14EA.S1.1230) PLS Status: In Progress Teacher: Mashburn, Mandy	5		-	A	5		<input type="checkbox"/>
EDG: Mathematics III A (2427-1EA.S1.1230) PLS Status: In Progress Teacher: Mashburn, Mandy	5		-	B	5		<input type="checkbox"/>

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 Call/Rescheduled 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:**

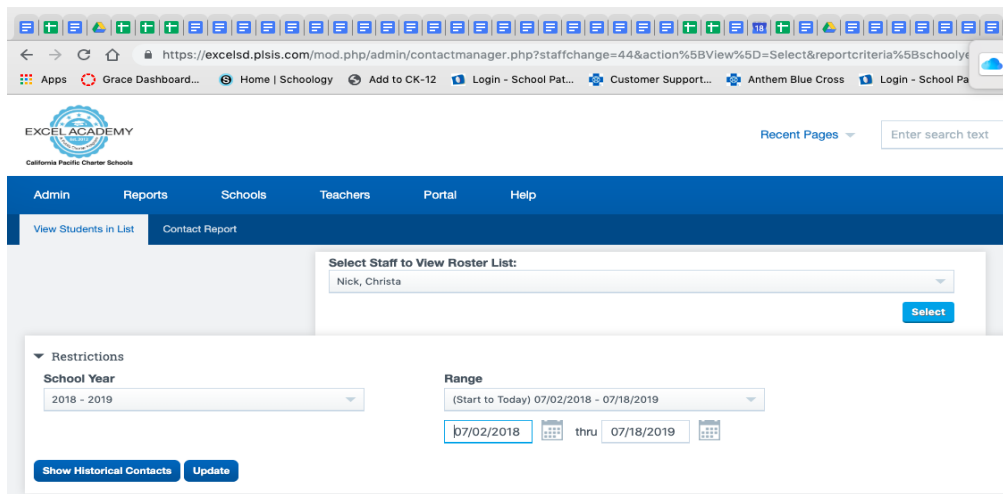
- ❖ You met with a parent outside of the usual LP meetings and helped them to navigate the curriculum; providing a pacing guide and suggestions for streamlining the work.
- ❖ A first meeting with a parent who is new to Excel Academy Charter School.
- ❖ Injury or Incident at a School Event/Field Trip (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.**

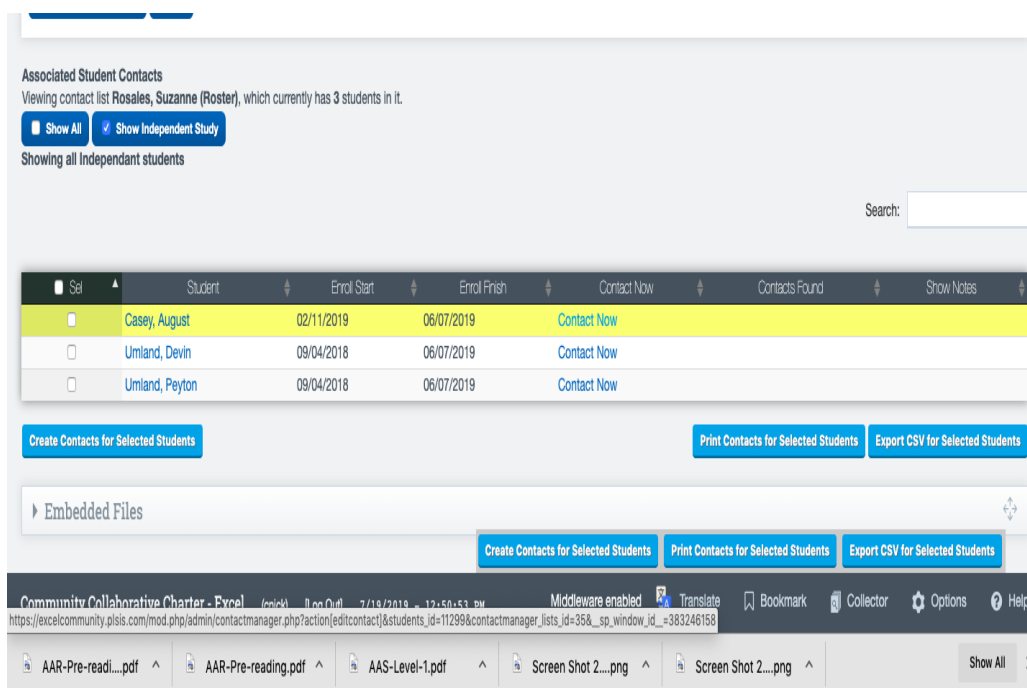
- You can also get to Contact Manager from the Home Screen and when on the student dashboard. Just look for the words “contact manager” and it will take you to the same place.

❖ **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.**

Area/Subject of Focus:	-- Choose --
Date Contacted:	07/19/2019
Beginning Time:	12:51 <input type="radio"/> AM <input checked="" type="radio"/> PM
End Time:	1:36 <input type="radio"/> AM <input checked="" type="radio"/> PM <small>Note: If left blank when creating a new contact, the finish time is automatically set when saving the contact.</small>
Total Time:	45 <small>Total time in minutes.</small>
Contact Method?	In-Person
Successfully Made Contact?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Follow up Required?	<input checked="" type="checkbox"/> Yes
Notes:	<p>Met for LP 4:</p> <p>Only received 3 samples and parent did not show a body of work. I reemphasized my need to see a body of work and that they should come prepared to the meeting with the learning for the LP.</p> <p>Parent stated they will follow up with me next week to show learning took place.</p>
Send Notification Flag:	-- SELECT --

Save Contact

- ❖ **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 choices* 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 junior high families include - If you have not already done so, please be sure to send your child's academic records including their report cards to our Registrar - registrar@excelacademy.education.

For High School families include - If you have not already done so, 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.

For TK-8th - 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

For 9th-12th - See above

Documents Attached:

- o School calendar
- o Preparing for the school year: This is basic information to know before completing your enrollment.
- o Curriculum Menus/Handbook
- o Course of Study: Please use this to record your final curriculum choices.
- o 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.

For High School families include - During our call, I will schedule your appointment to meet with our School Counselor to schedule your classes. They will also send you Master Agreement/Acknowledgement of Responsibilities for you and your student to sign. If there are still outstanding academic documents, be sure to send your child's academic records including an unofficial transcript and report cards to our Registrar - registrar@excelacademy.education.

For TK-8th - 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:

- o School calendar
- o Preparing for the School year: This is basic information to know before completing your enrollment.
- o Curriculum Menus/Handbook/HS catalog
- o Course of study: Please use this to record your final curriculum choices.
- o 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 for TK-8th. High school students will sign their MA following their initial meeting with the School Counselor. Secondary ToRs should have reviewed this in their initial phone call and then be available for any follow-up questions.

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 TK-8 and HS curriculum from SIS by clicking “view” and scrolling to the bottom to “print”

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
 -
 - 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. Curriculum (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 Course Catalog. ****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 curriculum, for all courses, **within 5 days of signing the Master Agreement if school has already begun.** ToRs must order curriculum 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 curriculum 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 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. We recommend that all students begin the college a-g track so that they have the widest set of options when they graduate. This is why all students follow a-g curriculum. With either the college or graduation track, all students meet with a School Counselor to schedule classes. For specific and individual college requirements we remind families that 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. *Make 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 either complete two in-person LP meetings, one in the first semester (should be near the beginning of the semester) and one in the second semester. Or, if all LP meetings are virtual, attend two additional in-person school functions to meet family and student in person.
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 Erin Petersen (TK-8) or Victoria Firetag (7-12) for a possible PIN.

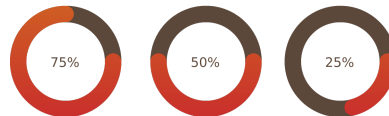
The Scheduling Email:

*(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 Tier 1-core differentiation strategies 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. ToRs are required to monitor school work on a weekly basis.
3. If proof of school work cannot be provided, the ToR will begin the [PIN process](#).

Synchronous Instruction and Live Interaction

Students are invited to participate in daily, synchronous learning opportunities. Excel Academy offers art, music, and SEL classes on a weekly basis.

Elementary & Secondary:

Monday through Friday: Virtual, daily engagement via Zoom for 30 minutes daily

- Students will be provided with additional learning 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 Lead ToR *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. Students meet with their ToR monthly for their LP meeting. These meetings may be in person or online. TK-6 students will alternate LP meetings between in person and virtual. 7-12 students and families must meet with their ToR once each semester in person, in the fall and in the spring. The 7-12 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:



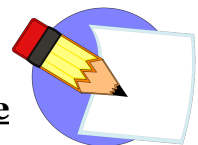
Parents need to communicate the monthly learning that takes place for their student(s). They may use reflection logs, learning logs or pacing guides to do this.

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 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:

- 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.) *
- 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.
- 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 front of the sample. This avoids confusion for the auditor.

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

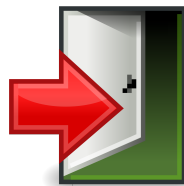
- a) Acceptable Samples:
 - i) A picture of a science lab, accompanied by a lab write-up, detailing what the student learned.
 - ii) Math homework in which all the student computations are shown (not just answers).
- b) Unacceptable Samples:
 - i) A photograph of the student completing a lab with NO 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 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.)



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 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.



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 and parents are responsible for complying with the responsibilities as outlined in the Master Agreement, Acknowledgement of Responsibilities, and other independent study policies. If you feel that a parent or student has failed to comply with Excel Academy expectations and policies, please contact the Elementary Coordinator, Secondary Coordinator, or Virtual Path Coordinator respectively prior to issuing or threatening a PIN.

[Click here for the PIN Template](#)

*Instructions are included in the PIN Template

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 Elementary Principal or 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. Detailed directions are in the [PIN Template](#). Always make a copy of the template and save it to your drive before continuing with filling out the information. 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 respective elementary or secondary Principal 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. 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.

[Click here for the BIP Template](#)

Elementary - send to Elementary Coordinator

Secondary - send to Secondary Coordinator

Virtual - send to Virtual Coordinator

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 Handbook](#) with 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 $\frac{1}{2}$, 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

PE - Lisa Durham

Science – Kim Platler

Social Studies – Jill Stowe

Spanish – Jill Stowe

VAPA – Heather Hathaway, music & Sandy Manich, art



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 - 3/4 - 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 and Accountability . 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 and Special 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.



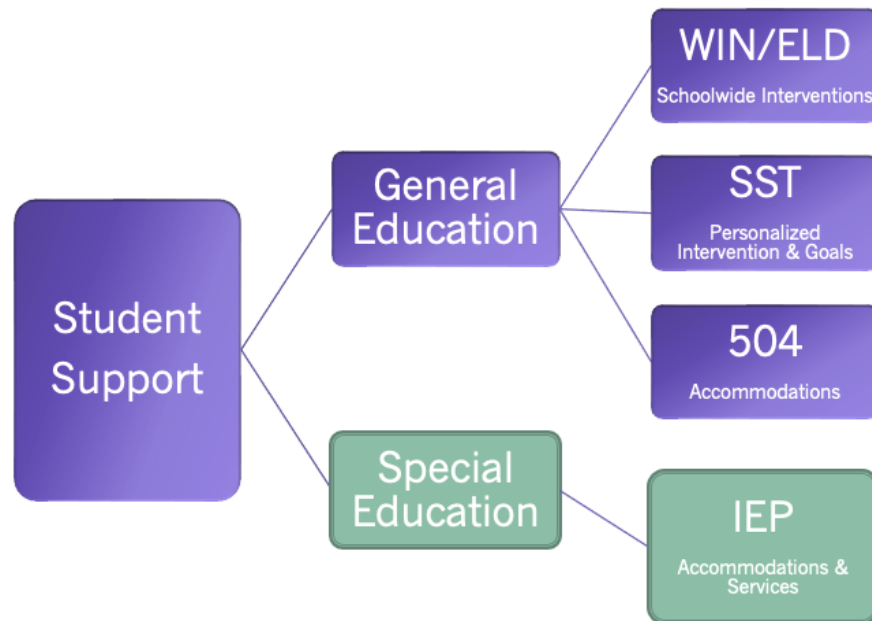
Intervention

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

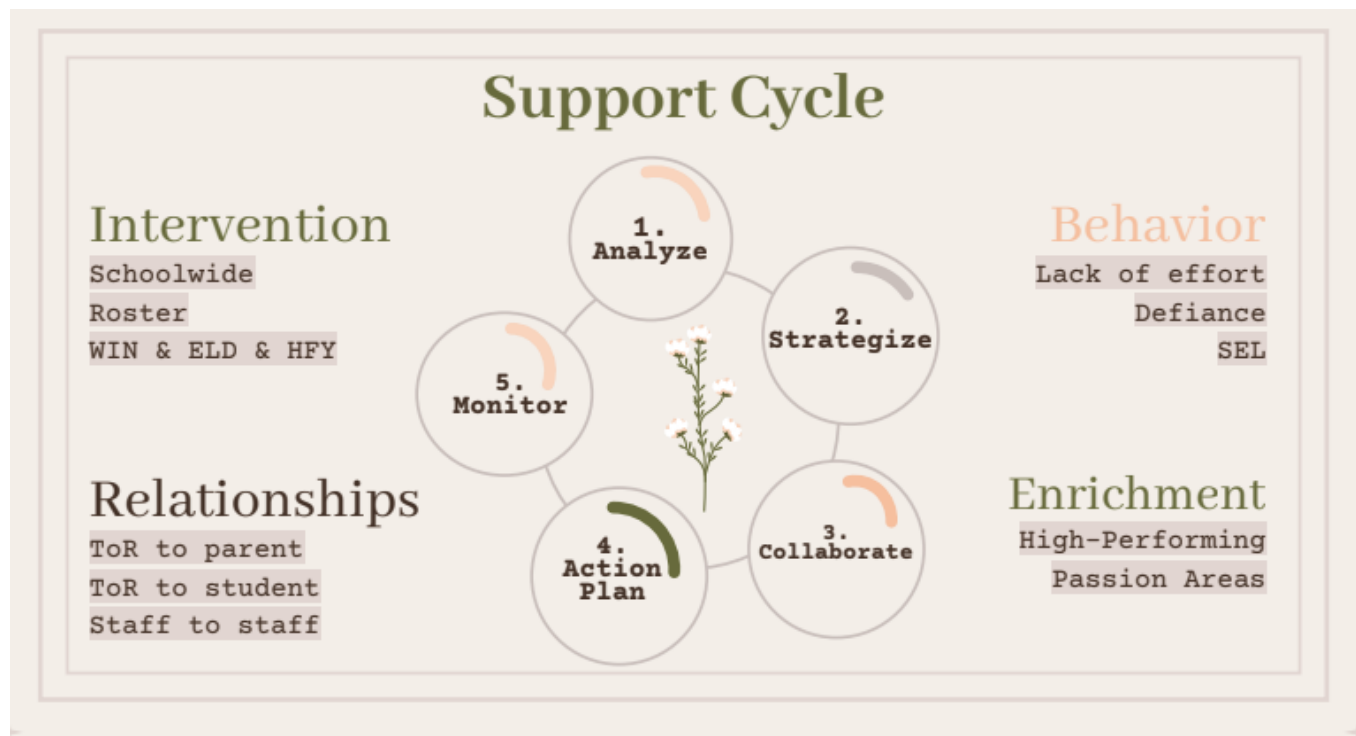
SST Meetings 7-12	Alison DeSchaine	Cultural Awareness	Tamara Murphy
504 Meetings TK-6	April Saade	SPED Referrals	Noell Scott & Tamara Murphy
504 Meetings 7-12	School Counselors	Acceleration/Retention	April Saade

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-risk 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: Alison 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 Noell Scott & cc Tamara Murphy 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			
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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. **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.**
- 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.

Reimbursement for Driving

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

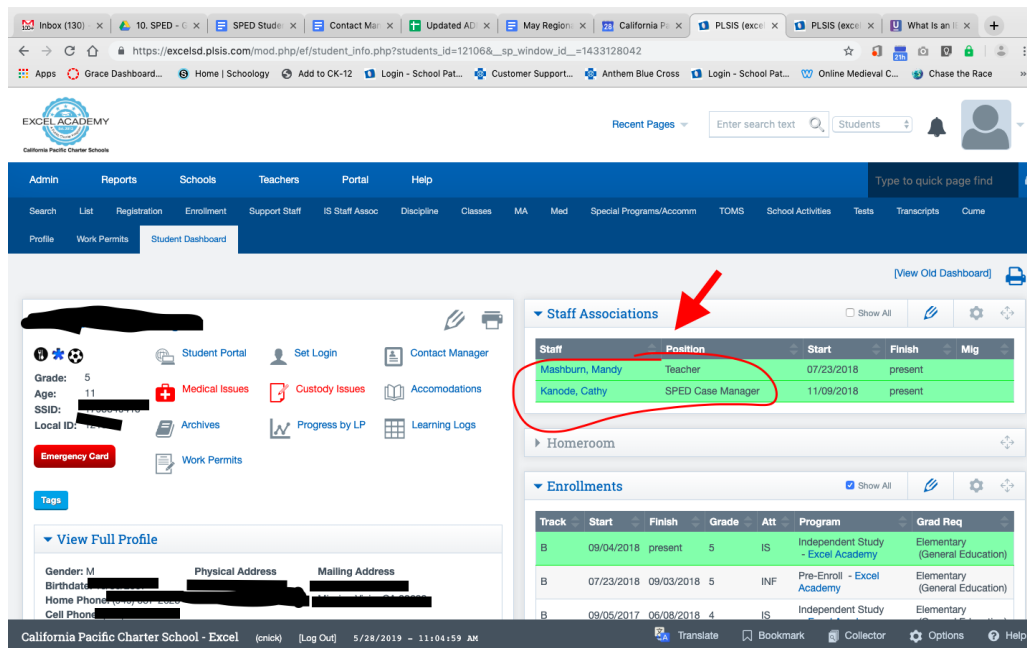
will need to spend extra time getting to know the educational needs/strengths of any new students with IEPs assigned to your roster.

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 **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 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 during a 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

<u>Policy Organizer</u>
<u>Comprehensive Safety Plan</u>
<u>Frequently Used Excel Websites for Families</u>
<u>Staff Directory</u>
<u>IT Request Form</u>

Calendar



Excel Academy Charter Schools 2023-2024 Academic Calendar

Sem 1 = 73(77) Days
Sem 2 = 102 Days

July						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

August						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

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

October						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

November						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

- Graduation
- Non student work days
- school holidays
- end of semester
- P1/P2 attendance
- All Staff in person

January						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

February						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

March						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

- | 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 |

April						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

May						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

June						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Outside of work calendar Federal Holidays
6/19, 7/4

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)

ESY - TBD
June 4th is both the
last day of the semester
and Graduation



Travel & Expense MANUAL

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OVERVIEW



It is the policy of Excel Academy Charter School to reimburse staff for reasonable and necessary expenses incurred during approved work-related travel. Employees seeking reimbursement should incur the lowest reasonable travel expenses and exercise care to avoid impropriety or the appearance of impropriety. Reimbursement is allowed only when reimbursement has not been, and will not be, received from other sources. If a circumstance arises that is not specifically covered in this travel policy, then the most conservative course of action should be taken. Business travel policies are aligned with company reimbursement rules. All business-related travel paid with Excel Academy Charter School funds must comply with school expenditure policies.

AUTHORIZATION & RESPONSIBILITY >

Staff travel must be authorized. Travelers should verify that planned travel is eligible for reimbursement before making travel arrangements, if it has not already been made for them. Within 30 days of completion of a trip, the traveler must submit for travel reimbursement via Paycom self service portal.

An individual may not approve his or her own travel or reimbursement; a supervisor will be assigned for online approval via Paycom self service portal. Travel reimbursement form must be approved by the Executive Director or the Director of Business Services (for travel over \$5,000) or by the business manager (for travel over \$1,000).

Travel and reimbursement for members of the management team must be approved by the Executive Director and will be reviewed annually by the internal audit.

Designated approval authorities are required to review expenditures and withhold reimbursement if there is reason to believe that the expenditures are inappropriate or extravagant.

PERSONAL FUNDS

Travelers should review reimbursement guidelines before spending personal funds for business travel to determine if such expenses are reimbursable. Excel Academy Charter School reserves the right to deny reimbursement of travel-related expenses for failure to comply with applicable policies and procedures.

Travelers who use personal funds to facilitate travel arrangements will not be reimbursed until after the trip occurs and proper documentation is submitted.



VACATION IN CONJUNCTION WITH BUSINESS TRAVEL >

In cases in which vacation time is added to a business trip, any cost variance in airfare, car rental or lodging must be clearly identified on the expense management submission. Excel Academy Charter School will not prepay any personal expenses with the intention of being "repaid" at a later time, nor will any personal expenses be reimbursed.

EXCEPTIONS >

Occasionally, it may be necessary for travelers to request exceptions to this travel policy. Requests for exceptions to the policy must be made in writing and approved by the supervisor and Executive Director.

Exceptions related to the Executive Director's or the Director of Business Services must be submitted for approval to the opposite person or to the treasurer of the board for approval. In most instances, the expected turnaround time for review and approval is five business days.



TRAVEL EXPENSES / PROCEDURES



GENERAL INFORMATION >

Authorized business travel for staff that includes prepayments must be pre-approved and generally pre-booked by the designated Excel staff member. This includes lodging, airfare and car rental. Reimbursement of parking, meals, mileage, gasoline in lieu of mileage and ferry or bus passes do not require pre-approval requests and can be submitted up to (30) days after the trip.

PERMISSIBLE PREPAID TRAVEL EXPENSES

Before the travel, Excel Academy Charter School may issue prepayments for airfare, rail transportation, rental vehicles, conference registration fees and cash advances. Applicable policies and methods of payments for these prepayments follow:

- **AIRFARE**

Travelers are expected to obtain the lowest available airfare that reasonably meets business travel needs. Airfare may be prepaid by the Excel business office.

Flights should be booked at least 30 days in advance to avoid premium airfare pricing.

Coach class or economy tickets must be purchased for domestic or international flights with flight time totaling less than five consecutive hours excluding layovers.

A less-than-first-class ticket (i.e. business class) may be purchased at Excel Academy Charter School's discretion for domestic or international flights with flight time exceeding five consecutive hours excluding layovers.

Airfare may be purchased with a credit card or check through the Excel business office with a request on requisition form.

PERMISSIBLE PREPAID TRAVEL EXPENSES CONTINUED

- **RAIL TRANSPORTATION**

Excel Academy Charter School will prepay rail transportation provided that the cost does not exceed the cost of the least expensive airfare.



- **RENTAL VEHICLES**

Excel Academy Charter School will pay for approved use of a rental vehicle. See the section on reimbursements below in this section.

- **CONFERENCE REGISTRATION FEES**

Conference registration fees can be prepaid with a credit card or check through the Excel business office with submission of a requisition form. Business-related banquets or meals that are considered part of the conference can be paid with the registration fees; however, such meals must be deducted from the traveler's per diem allowance. For example: if a sponsored meal is available staff cannot submit per diem expense reimbursement requests for dining elsewhere.

- **TRAVEL ADVANCES**

Cash advances are authorized for specific situations that might cause undue financial hardship for business travelers. These situations are limited to staff traveling on behalf of Excel Academy Charter School. A maximum of 80 percent of the total estimated cost can be advanced, and must be pre-approved 30 days prior to the day of the trip.

Expenses associated with the travel must be reconciled and substantiated within two weeks of the return date. The traveler must repay Excel Academy Charter School for any advances in excess of the approved reimbursable expenses. The department initiating the travel is responsible for notifying the business office to deposit any excess funds into the appropriate departmental account.

Travel advances are processed by submitting a completed requisition form to the business office. Reimbursement for any remaining expenses is processed through Paycom self service portal and approved by the designated approval authority.



REIMBURSEMENTS



R requests for reimbursements of travel-related expenses are submitted via employee Paycom self service portal.

Submissions must be made within two weeks after the trip is completed. Travel Reimbursement forms not submitted within this time frame require exception approval from the Executive Director or from the Director of Business Services.

Reimbursement of travel expenses is based on documentation of reasonable and actual expenses supported by the original, itemized receipts where required. Reimbursements that may be paid by Excel Academy Charter School are shown below:

- **AIRFARE**

If the airfare was not prepaid by the business office, an original itemized airline receipt, an e-ticket receipt/statement or an Internet receipt/statement is required. The receipt must show the method of payment and indicate that payment was made.

- **RAIL TRANSPORTATION**

If rail transportation was not prepaid by the business office, an original itemized receipt, original e-ticket receipt/statement or Internet receipt/statement is required. The receipt must show the method of payment and indicate that payment was made.

- **AUTOMOBILE (PERSONALLY OWNED - DOMESTIC TRAVEL)**

A valid driver's license issued within the United States and personal automobile insurance are required for expenses to be reimbursed. Drivers should be aware of the extent of coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature.

Reimbursement for use of a personal automobile is based on the IRS mileage rate.

Paycom self service portal expense submission is required for reimbursement of all mileage expenses. Travelers may opt to request reimbursement for actual gasoline expenses in lieu of the IRS mileage rate.

- **AUTOMOBILE (RENTAL—DOMESTIC TRAVEL)**

Reimbursement for a commercial rental vehicle as a primary mode of transportation is authorized only if the rental vehicle is more economical than any other type of public transportation, or if the destination is not otherwise accessible. Vehicle rental at a destination city is reimbursable. Original receipts are required.

• **AUTOMOBILE (RENTAL—DOMESTIC TRAVEL) CONT.**

Excel Academy Charter School authorizes reimbursement for the most economic vehicle available. In certain circumstances larger vehicles may be rented, with supervisory approval. The rental agreement must clearly show the date and the points of departure/arrival, as well as the total cost. Drivers must adhere to the rental requirements, and restrictions must be followed. Original receipts are required.

When vehicle rentals are necessary, Excel Academy Charter School encourages travelers to purchase collision damage waiver (CDW) and loss damage waiver (LDW) coverage. Excel Academy Charter School will reimburse the cost of CDW and LDW coverage; all other insurance reimbursements will be denied.

Drivers should be aware of the extent of coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature.

Parking fees, tolls and other incidental costs associated with the vehicle use are not covered by the rental agreement but will be reimbursed through Paycom expense submission.

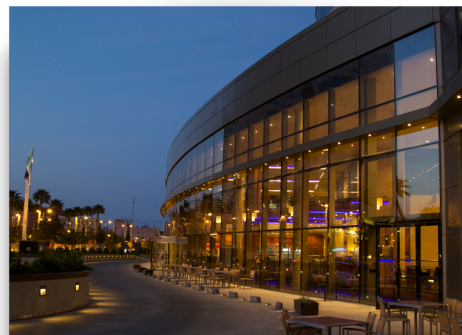
Travelers are strongly encouraged to fill the gas tank before returning the vehicle to the rental agency to avoid service fees and more expensive fuel rates.

• **CONFERENCE REGISTRATION FEES**

If the conference fee was not prepaid, Excel Academy Charter School will reimburse these fees, including business-related banquets or meals that are part of the conference registration. Original receipts to support the payment are required. If the conference does not provide a receipt, then a canceled check, credit card slip/statement or documentation that the amount was paid is required for reimbursement.

Entertainment activities such as golf outings and sightseeing tours will not be reimbursed if not hosted and sponsored by the school.

Registration fees paid directly by an individual will not be reimbursed until the conference is completed.



• **LODGING (COMMERCIAL)**

The cost of overnight lodging (room rate and tax only) will be reimbursed to the traveler if the authorized travel is 45 miles or more from the traveler's home or primary worksite.

Exceptions to this restriction may be approved in writing by the Executive Director.

Excel Academy Charter School will reimburse lodging expenses at reasonable, single occupancy or standard business room rates. When the hotel or motel is the conference or convention site, reimbursement will be limited to the conference rate.

Only single room rates are authorized for payment or reimbursement unless the second party is representing the agency in an authorized capacity. If the lodging receipt shows more than a single occupancy, the single room rate must be noted. If reimbursement for more than the single room rate is requested, the name of the second person must be included.

• MEALS (PER DIEM)

Excel Academy Charter School per diem rates are based on the U.S. General Services Administration Guidelines, which vary by city location. In addition to meals these rates include incidental expenses such as laundry, dry cleaning and service tips (e.g., housekeeping or porter tips). Incidental expenses, unless specifically cited in this policy, will not be reimbursed. Staff is urged to use personal methods of payments for incidentals and not charge items to lodging.

Per diem reimbursements are based on departure and return times over the entire 24-hour day and are prorated accordingly.

If a free meal is included in a conference registration fee and sponsored by the school or host, built into the standard, single hotel room rate or replaced by a legitimate business meal, the per diem allowance for that meal may not be claimed.

Receipts are not required for per diem allowances. Per diem allowances are reimbursed after the trip is completed via Paycom self service portal.

• BUSINESS MEALS

Travelers are required to follow Excel Academy Charter School expenditure policies when requesting reimbursement for business meals. Original itemized receipts are required. Food and non-alcoholic beverages ONLY can be claimed. Per diem meals include expense of no more than \$105 per day, inclusive of tax and gratuity:



Breakfast = \$25 (inclusive of tax and gratuity)

Lunch = \$35 (inclusive of tax and gratuity)

Dinner = \$45 (inclusive of tax and gratuity)

Employees will be responsible for any overages that exceed the per diem amounts.

• BUSINESS EXPENSES

Business expenses, including faxes, photocopies, Internet charges, data ports, airline WiFi, and business telephone calls incurred while on travel status, can be reimbursed. Original itemized receipts are required.

• PARKING

Original receipts are required for parking fees (including airport parking). The lodging bill can be used as a receipt when charges are included as part of the overnight stay.

• TELEPHONE CALLS

The costs of personal telephone calls are the responsibility of the individual.

• TOLLS

Original receipts are required for tolls.

• MISCELLANEOUS TRANSPORTATION

Original receipts are required for taxi, bus, subway, metro, ferry and other modes of transportation.



• VISA, PASSPORT FEES, AND IMMUNIZATIONS

If these items are required for international travel, their reimbursement is left to the discretion of your supervisor. If approved by the designated authority, original itemized receipts are required.



• NON-REIMBURSABLE TRAVEL EXPENSES

The following items that may be associated with business travel will not be reimbursed by Excel Academy Charter School:

- Airline club memberships.
- Airline upgrades.
- Business class for domestic flights or first class for all flights.
- Child care, babysitting, house-sitting, or pet-sitting/kennel charges.
- Commuting between home and the primary work location.
- Costs incurred by traveler's failure to cancel travel or hotel reservations in a timely fashion unless company sponsored cancellation.
- Evening or formal wear expenses.
- Haircuts and personal grooming.
- Laundry and dry cleaning.
- Alcoholic beverages.
- Passports, vaccinations and visas when not required as a specific and necessary condition of the travel assignment.
- Personal entertainment expenses, including in-flight movies, headsets, health club facilities, hotel pay-per-view movies, in-theater movies, social activities and related incidental costs.
- Travel accident insurance premiums or purchase of additional travel insurance.
- Other expenses not directly related to business travel.

• TRAVEL FOR NON-EMPLOYEES

Additional costs for travel, lodging, meal or other travel expenses for spouses or other family members will not be reimbursed unless the individual has a bona fide company purpose for engaging in the travel or attending the event. Such travel is generally limited to Executive Administration and should occur infrequently.



REQUIRED ANNUAL TRAVEL FOR ADMINISTRATIVE STAFF :

- ALL EXECUTIVE DIRECTORS
- ALL DIRECTORS
- APPLICABLE ASSISTANT DIRECTORS

A+PLUS+ NETWORKING CONFERENCE: OCTOBER

(ALTERNATES NOR CAL AND SO CAL) IN 23/24 WILL BE NOR CAL.

CCSA: MARCH

(ALTERNATES NOR CAL AND SO CAL) IN 23/24 WILL BE SO CAL .

CSDC: NOVEMBER OR EARLY DECEMBER

(ALTERNATES NOR CAL AND SO CAL) IN 23/24 WILL BE SO CAL .

ADMIN SUMMIT: JANUARY

SELPA MEETINGS: 4 MEETINGS PER YEAR

HEIDI AND LARA ULMER(2 MEETINGS A YEAR) OR HEIDI AND LARRY ALVARADO(2 MEETINGS)



As Administrative representation is important at local and state industry conferences, we ask all Administrative staff to make a commitment to attending the required events. We ask that staff are in attendance the duration of the event and complete any sessions assigned by the Executive Director.

Written request must be submitted 30 days prior to, or at earliest notice, to the Executive Director that Administrative staff is unable to attend mandatory conference events.

Staff unable to attend events for non-business related purposes must complete submission of the appropriate alternative time management request via Paycom self service portal.



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OVERVIEW



It is the policy of Excel Academy Charter School to reimburse staff for reasonable and necessary expenses incurred during approved work-related travel. Employees seeking reimbursement should incur the lowest reasonable travel expenses and exercise care to avoid impropriety or the appearance of impropriety. Reimbursement is allowed only when reimbursement has not been, and will not be, received from other sources. If a circumstance arises that is not specifically covered in this travel policy, then the most conservative course of action should be taken. Business travel policies are aligned with company reimbursement rules. All business-related travel paid with Excel Academy Charter School funds must comply with school expenditure policies.

AUTHORIZATION & RESPONSIBILITY >

Staff travel must be authorized. Travelers should verify that planned travel is eligible for reimbursement before making travel arrangements, if it has not already been made for them. Within 30 days of completion of a trip, the traveler must submit for travel reimbursement via Paycom self service portal.

An individual may not approve his or her own travel or reimbursement; a supervisor will be assigned for online approval via Paycom self service portal. Travel reimbursement form must be approved by the Executive Director or the Director of Business Services (for travel over \$5,000) or by the business manager (for travel over \$1,000).

Travel and reimbursement for members of the management team must be approved by the Executive Director and will be reviewed annually by the internal audit.

Designated approval authorities are required to review expenditures and withhold reimbursement if there is reason to believe that the expenditures are inappropriate or extravagant.

PERSONAL FUNDS

Travelers should review reimbursement guidelines before spending personal funds for business travel to determine if such expenses are reimbursable. Excel Academy Charter School reserves the right to deny reimbursement of travel-related expenses for failure to comply with applicable policies and procedures.

Travelers who use personal funds to facilitate travel arrangements will not be reimbursed until after the trip occurs and proper documentation is submitted.



VACATION IN CONJUNCTION WITH BUSINESS TRAVEL >

In cases in which vacation time is added to a business trip, any cost variance in airfare, car rental or lodging must be clearly identified on the expense management submission. Excel Academy Charter School will not prepay any personal expenses with the intention of being "repaid" at a later time, nor will any personal expenses be reimbursed.

EXCEPTIONS >

Occasionally, it may be necessary for travelers to request exceptions to this travel policy. Requests for exceptions to the policy must be made in writing and approved by the supervisor and Executive Director.

Exceptions related to the Executive Director's or the Director of Business Services must be submitted for approval to the opposite person or to the treasurer of the board for approval. In most instances, the expected turnaround time for review and approval is five business days.



TRAVEL EXPENSES / PROCEDURES



GENERAL INFORMATION >

Authorized business travel for staff that includes prepayments must be pre-approved and generally pre-booked by the designated Excel staff member. This includes lodging, airfare and car rental. Reimbursement of parking, meals, mileage, gasoline in lieu of mileage and ferry or bus passes do not require pre-approval requests and can be submitted up to (30) days after the trip.

PERMISSIBLE PREPAID TRAVEL EXPENSES

Before the travel, Excel Academy Charter School may issue prepayments for airfare, rail transportation, rental vehicles, conference registration fees and cash advances. Applicable policies and methods of payments for these prepayments follow:

• AIRFARE

Travelers are expected to obtain the lowest available airfare that reasonably meets business travel needs. Airfare may be prepaid by the Excel business office.

Flights should be booked at least 30 days in advance to avoid premium airfare pricing.

Coach class or economy tickets must be purchased for domestic or international flights with flight time totaling less than five consecutive hours excluding layovers.

A less-than-first-class ticket (i.e. business class) may be purchased at Excel Academy Charter School's discretion for domestic or international flights with flight time exceeding five consecutive hours excluding layovers.

Airfare may be purchased with a credit card or check through the Excel business office with a request on requisition form.

PERMISSIBLE PREPAID TRAVEL EXPENSES CONTINUED

- **RAIL TRANSPORTATION**

Excel Academy Charter School will prepay rail transportation provided that the cost does not exceed the cost of the least expensive airfare.



- **RENTAL VEHICLES**

Excel Academy Charter School will pay for approved use of a rental vehicle. See the section on reimbursements below in this section.

- **CONFERENCE REGISTRATION FEES**

Conference registration fees can be prepaid with a credit card or check through the Excel business office with submission of a requisition form. Business-related banquets or meals that are considered part of the conference can be paid with the registration fees; however, such meals must be deducted from the traveler's per diem allowance. For example: if a sponsored meal is available staff cannot submit per diem expense reimbursement requests for dining elsewhere.

- **TRAVEL ADVANCES**

Cash advances are authorized for specific situations that might cause undue financial hardship for business travelers. These situations are limited to staff traveling on behalf of Excel Academy Charter School. A maximum of 80 percent of the total estimated cost can be advanced, and must be pre-approved 30 days prior to the day of the trip.

Expenses associated with the travel must be reconciled and substantiated within two weeks of the return date. The traveler must repay Excel Academy Charter School for any advances in excess of the approved reimbursable expenses. The department initiating the travel is responsible for notifying the business office to deposit any excess funds into the appropriate departmental account.

Travel advances are processed by submitting a completed requisition form to the business office. Reimbursement for any remaining expenses is processed through Paycom self service portal and approved by the designated approval authority.



REIMBURSEMENTS



R requests for reimbursements of travel-related expenses are submitted via employee Paycom self service portal.

Submissions must be made within two weeks after the trip is completed. Travel Reimbursement forms not submitted within this time frame require exception approval from the Executive Director or from the Director of Business Services.

Reimbursement of travel expenses is based on documentation of reasonable and actual expenses supported by the original, itemized receipts where required. Reimbursements that may be paid by Excel Academy Charter School are shown below:

- **AIRFARE**

If the airfare was not prepaid by the business office, an original itemized airline receipt, an e-ticket receipt/statement or an Internet receipt/statement is required. The receipt must show the method of payment and indicate that payment was made.

- **RAIL TRANSPORTATION**

If rail transportation was not prepaid by the business office, an original itemized receipt, original e-ticket receipt/statement or Internet receipt/statement is required. The receipt must show the method of payment and indicate that payment was made.

- **AUTOMOBILE (PERSONALLY OWNED - DOMESTIC TRAVEL)**

A valid driver's license issued within the United States and personal automobile insurance are required for expenses to be reimbursed. Drivers should be aware of the extent of coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature.

Reimbursement for use of a personal automobile is based on the IRS mileage rate.

Paycom self service portal expense submission is required for reimbursement of all mileage expenses. Travelers may opt to request reimbursement for actual gasoline expenses in lieu of the IRS mileage rate.

- **AUTOMOBILE (RENTAL—DOMESTIC TRAVEL)**

Reimbursement for a commercial rental vehicle as a primary mode of transportation is authorized only if the rental vehicle is more economical than any other type of public transportation, or if the destination is not otherwise accessible. Vehicle rental at a destination city is reimbursable. Original receipts are required.

• **AUTOMOBILE (RENTAL—DOMESTIC TRAVEL) CONT.**

Excel Academy Charter School authorizes reimbursement for the most economic vehicle available. In certain circumstances larger vehicles may be rented, with supervisory approval. The rental agreement must clearly show the date and the points of departure/arrival, as well as the total cost. Drivers must adhere to the rental requirements, and restrictions must be followed. Original receipts are required.

When vehicle rentals are necessary, Excel Academy Charter School encourages travelers to purchase collision damage waiver (CDW) and loss damage waiver (LDW) coverage. Excel Academy Charter School will reimburse the cost of CDW and LDW coverage; all other insurance reimbursements will be denied.

Drivers should be aware of the extent of coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature.

Parking fees, tolls and other incidental costs associated with the vehicle use are not covered by the rental agreement but will be reimbursed through Paycom expense submission.

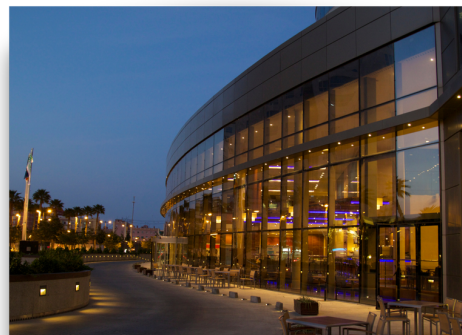
Travelers are strongly encouraged to fill the gas tank before returning the vehicle to the rental agency to avoid service fees and more expensive fuel rates.

• **CONFERENCE REGISTRATION FEES**

If the conference fee was not prepaid, Excel Academy Charter School will reimburse these fees, including business-related banquets or meals that are part of the conference registration. Original receipts to support the payment are required. If the conference does not provide a receipt, then a canceled check, credit card slip/statement or documentation that the amount was paid is required for reimbursement.

Entertainment activities such as golf outings and sightseeing tours will not be reimbursed if not hosted and sponsored by the school.

Registration fees paid directly by an individual will not be reimbursed until the conference is completed.



• **LODGING (COMMERCIAL)**

The cost of overnight lodging (room rate and tax only) will be reimbursed to the traveler if the authorized travel is 45 miles or more from the traveler's home or primary worksite.

Exceptions to this restriction may be approved in writing by the Executive Director.

Excel Academy Charter School will reimburse lodging expenses at reasonable, single occupancy or standard business room rates. When the hotel or motel is the conference or convention site, reimbursement will be limited to the conference rate.

Only single room rates are authorized for payment or reimbursement unless the second party is representing the agency in an authorized capacity. If the lodging receipt shows more than a single occupancy, the single room rate must be noted. If reimbursement for more than the single room rate is requested, the name of the second person must be included.

• MEALS (PER DIEM)

Excel Academy Charter School per diem rates are based on the U.S. General Services Administration Guidelines, which vary by city location. In addition to meals these rates include incidental expenses such as laundry, dry cleaning and service tips (e.g., housekeeping or porter tips). Incidental expenses, unless specifically cited in this policy, will not be reimbursed. Staff is urged to use personal methods of payments for incidentals and not charge items to lodging.

Per diem reimbursements are based on departure and return times over the entire 24-hour day and are prorated accordingly.

If a free meal is included in a conference registration fee and sponsored by the school or host, built into the standard, single hotel room rate or replaced by a legitimate business meal, the per diem allowance for that meal may not be claimed.

Receipts are not required for per diem allowances. Per diem allowances are reimbursed after the trip is completed via Paycom self service portal.

• BUSINESS MEALS

Travelers are required to follow Excel Academy Charter School expenditure policies when requesting reimbursement for business meals. Original itemized receipts are required. Food and non-alcoholic beverages ONLY can be claimed. Per diem meals include expense of no more than ~~\$80~~-\$105 per day, inclusive of tax and gratuity:



Breakfast = \$20-\$25 (inclusive of tax and gratuity)

Lunch = \$25-\$35 (inclusive of tax and gratuity)

Dinner = \$35-\$45 (inclusive of tax and gratuity)

Employees will be responsible for any overages that exceed the per diem amounts.

• BUSINESS EXPENSES

Business expenses, including faxes, photocopies, Internet charges, data ports, airline WiFi, and business telephone calls incurred while on travel status, can be reimbursed. Original itemized receipts are required.

• PARKING

Original receipts are required for parking fees (including airport parking). The lodging bill can be used as a receipt when charges are included as part of the overnight stay.

• TELEPHONE CALLS

The costs of personal telephone calls are the responsibility of the individual.

• TOLLS

Original receipts are required for tolls.

• MISCELLANEOUS TRANSPORTATION

Original receipts are required for taxi, bus, subway, metro, ferry and other modes of transportation.



• VISA, PASSPORT FEES, AND IMMUNIZATIONS

If these items are required for international travel, their reimbursement is left to the discretion of your supervisor. If approved by the designated authority, original itemized receipts are required.



• NON-REIMBURSABLE TRAVEL EXPENSES

The following items that may be associated with business travel will not be reimbursed by Excel Academy Charter School:

- Airline club memberships.
- Airline upgrades.
- Business class for domestic flights or first class for all flights.
- Child care, babysitting, house-sitting, or pet-sitting/kennel charges.
- Commuting between home and the primary work location.
- Costs incurred by traveler's failure to cancel travel or hotel reservations in a timely fashion unless company sponsored cancellation.
- Evening or formal wear expenses.
- Haircuts and personal grooming.
- Laundry and dry cleaning.
- Alcoholic beverages.
- Passports, vaccinations and visas when not required as a specific and necessary condition of the travel assignment.
- Personal entertainment expenses, including in-flight movies, headsets, health club facilities, hotel pay-per-view movies, in-theater movies, social activities and related incidental costs.
- Travel accident insurance premiums or purchase of additional travel insurance.
- Other expenses not directly related to business travel.

• TRAVEL FOR NON-EMPLOYEES

Additional costs for travel, lodging, meal or other travel expenses for spouses or other family members will not be reimbursed unless the individual has a bona fide company purpose for engaging in the travel or attending the event. Such travel is generally limited to Executive Administration and should occur infrequently.



REQUIRED ANNUAL TRAVEL FOR ADMINISTRATIVE STAFF :

- ALL EXECUTIVE DIRECTORS
- ALL DIRECTORS
- APPLICABLE ASSISTANT DIRECTORS

APLUS+ NETWORKING CONFERENCE: OCTOBER

(ALTERNATES NOR CAL AND SO CAL)

CCSA: MARCH

(ALTERNATES NOR CAL AND SO CAL) IN 23/24
WILL BE SO CAL .

CSDC: NOVEMBER OR EARLY DECEMBER

(ALTERNATES NOR CAL AND SO CAL) IN 23/24
WILL BE SO CAL .

ADMIN RETREAT SUMMIT : NOVEMBER JANUARY

SELPA MEETINGS: 4 MEETINGS PER YEAR

HEIDI AND LARA ULMER(2 MEETINGS A YEAR) OR
HEIDI AND LARRY ALVARADO(2 MEETINGS)



As Administrative representation is important at local and state industry conferences, we ask all Administrative staff to make a commitment to attending the required events. We ask that staff are in attendance the duration of the event and complete any sessions assigned by the Executive Director.

Written request must be submitted 30 days prior to, or at earliest notice, to the Executive Director that Administrative staff is unable to attend mandatory conference events.

Staff unable to attend events for non-business related purposes must complete submission of the appropriate alternative time management request via Paycom self service portal.

Coversheet

Policy Development

Section: XI. Consent
Item: D. Policy Development
Purpose:
Submitted by:
Related Material: EACS - 1025 UCP Policy and Complaint Form-Final.pdf
REDLINE EACS - 1025 UCP Policy and Complaint Form-Final.pdf

COMMUNITY RELATIONS**1025-EACS****UNIFORM COMPLAINT POLICY**

It is the policy of Excel Academy Charter Schools (“EACS” or “School”) to comply with applicable federal and state laws and regulations. The School is the local agency primarily responsible for compliance with federal and state laws and regulations governing educational programs. Pursuant to this policy, persons responsible for compliance and/or conducting investigations shall be knowledgeable about the laws and programs which they are assigned to investigate. This complaint procedure is adopted to provide a uniform system of complaint processing (“UCP”) for the following types of complaints:

1. Complaints alleging unlawful discrimination, harassment, intimidation or bullying against any protected group on the basis of the actual or perceived characteristics of age, ancestry, color, mental disability, physical disability, ethnic group identification, immigration status, citizenship, gender expression, gender identity, gender, genetic information, nationality, national origin, race or ethnicity (including traits historically associated with race, including, but not limited to, hair texture and protected hairstyles such as braids, locks, and twists), religion, medical condition, marital status, sex, or sexual orientation, or on the basis of a person’s association with a person or group with one or more of these actual or perceived characteristics in any School program or activity.
2. Complaints alleging a violation of state or federal law or regulations governing the following programs:
 - a. Accommodations for Pregnant, Parenting or Lactating Students;
 - b. Adult Education;
 - c. Career Technical and Technical Education;
 - d. Career Technical and Technical Training;
 - e. Child Care and Development Programs;
 - f. Consolidated Categorical Aid;
 - g. Education of Students in Foster Care, Students who are Homeless, former Juvenile Court Students now enrolled in a public school, Migratory Children and Children of Military Families;
 - h. Every Student Succeeds Act;
 - i. Migrant Education Programs;
 - j. Regional Occupational Centers and Programs; and/or
 - k. School Safety Plans.
3. Complaints alleging that a pupil enrolled in a public school was required to pay a pupil fee for participation in an educational activity as those terms are defined below.
 - a. “Educational activity” means an activity offered by a school, school district, charter school or county office of education that constitutes an integral fundamental part of elementary and secondary education, including, but not limited to, curricular and extracurricular activities.
 - b. “Pupil fee” means a fee, deposit or other charge imposed on pupils, or a pupil’s parents or guardians, in violation of Education Code section 49011 and Section 5 of Article IX of the California Constitution, which require educational activities to be provided free of charge to all pupils without regard to their families’ ability or willingness to pay fees

COMMUNITY RELATIONS**1025-EACS****UNIFORM COMPLAINT POLICY**

or request special waivers, as provided for in *Hartzell v. Connell* (1984) 35 Cal.3d 899. A pupil fee includes, but is not limited to, all of the following:

- i. A fee charged to a pupil as a condition for registering for school or classes, or as a condition for participation in a class or an extracurricular activity, regardless of whether the class or activity is elective or compulsory or is for credit.
 - ii. A security deposit, or other payment, that a pupil is required to make to obtain a lock, locker, book, class apparatus, musical instrument, uniform or other materials or equipment.
 - iii. A purchase that a pupil is required to make to obtain materials, supplies, equipment or uniforms associated with an educational activity.
- c. A pupil fees complaint and complaints regarding local control and accountability plans (“LCAP”) only, may be filed anonymously (without an identifying signature), if the complaint provides evidence or information leading to evidence to support an allegation of noncompliance with Education Code sections 52060 - 52077, including an allegation of a violation of Education Code sections 47606.5 or 47607.3, as referenced in Education Code section 52075, regarding local control and accountability plans.
- d. If the School finds merit in a pupil fees complaint, or the California Department of Education (“CDE”) finds merit in an appeal, the School shall provide a remedy to all affected pupils, parents, and guardians that, where applicable, includes reasonable efforts by the School to ensure full reimbursement to all affected pupils, parents, and guardians, subject to procedures established through regulations adopted by the state board.
- e. Nothing in this policy shall be interpreted to prohibit solicitation of voluntary donations of funds or property, voluntary participation in fundraising activities, or the School and other entities from providing pupils prizes or other recognition for voluntarily participating in fundraising activities.
4. Complaints alleging noncompliance with the requirements governing the Local Control Funding Formula (“LCFF”), LCAP under Education Code sections 47606.5 and 47607.3, as applicable. If the School adopts a School Plan for Student Achievement in addition to its LCAP, complaints of noncompliance with the requirements of the School Plan for Student Achievement under Education Code sections 64000, 64001, 65000, and 65001 shall also fall under this Policy.
5. Complaints alleging noncompliance regarding child nutrition programs established pursuant to Education Code sections 49490-49590 are governed by Title 7, Code of Federal Regulations (“C.F.R.”) sections 210.19(a)(4), 215.1(a), 220.13(c), 225.11(b), 226.6(n), and 250.15(d) and Title 5, California Code of Regulations (“C.C.R.”) sections 15580 - 15584.

COMMUNITY RELATIONS**1025-EACS****UNIFORM COMPLAINT POLICY**

6. Complaints alleging noncompliance regarding special education programs established pursuant to Education Code sections 56000-56865 and 59000-59300 are governed by the procedures set forth in 5 C.C.R. sections 3200-3205 and 34 C.F.R. sections 300.151-300.153.
7. Complaints alleging noncompliance regarding teacher vacancy or miss assignments as follows:
 - a. A teacher who lacks credentials or training to teach English Learners is assigned to teach a class with one or more English Learner pupils in the class. This subparagraph does not relieve a school district from complying with state or federal law regarding teachers of English language learners.

The School acknowledges and respects every individual's rights to privacy. Unlawful discrimination, harassment, intimidation or bullying complaints shall be investigated in a manner that protects (to the greatest extent reasonably possible and as permitted by law) the confidentiality of the parties, including but not limited to the identity of the complainant, and maintains the integrity of the process. The School cannot guarantee anonymity of the complainant. This includes keeping the identity of the complainant confidential. However, the School will attempt to do so as appropriate. The School may find it necessary to disclose information regarding the complaint/complainant to the extent required by law or necessary to carry out the investigation or proceedings, as determined by the Director of Human Resources or designee on a case-by-case basis. The School shall ensure that complainants are protected from retaliation.

Compliance Officer(s)

The Board of Directors designates the following compliance officer(s) to receive and investigate complaints and to ensure the School's compliance with law:

Megan Anderson
 Assistant Director of Human Resources
 1 Technology Drive, I-811
 Irvine, CA 92618

The Executive Director, or designee shall ensure that the compliance officer(s) designated to investigate complaints are knowledgeable about the laws and programs for which they are responsible. The compliance officer may have access to legal counsel as determined by the Executive Director, or designee.

Should a complaint be filed against the Executive Director, the compliance officer for that case shall be the President of the Board of Directors.

Notifications

The Executive Director or designee shall make available copies of this Policy free of charge. The annual notice of this Policy may be made available on the School's website.

COMMUNITY RELATIONS**1025-EACS****UNIFORM COMPLAINT POLICY**

The School shall annually provide written notification of the School's UCP to employees, students, parents and/or guardians, advisory committees, private school officials or representatives, and other interested parties as applicable.

The annual notice shall be in English. When necessary under Education Code section 48985, if fifteen (15) percent or more of the pupils enrolled in the School speak a single primary language other than English, this annual notice will also be provided to the parent/guardian of any such students in their primary language.

The annual notice shall include the following:

- (a) A list of the types of complaints that fall under the scope of the UCP and the state and federal provisions that govern complaints regarding child nutrition programs and special education programs.
- (b) A statement clearly identifying any California State preschool programs that the School is operating as exempt from licensing pursuant to Health and Safety Code section 1596.792(o) and corresponding Title 5 health and safety regulations, and any California State preschool programs that the School is operating pursuant to Title 22 licensing requirements.
- (c) A statement that the School is primarily responsible for compliance with federal and state laws and regulations.
- (d) A statement that a pupil enrolled in a public school shall not be required to pay a pupil fee for participation in an educational activity.
- (e) A statement identifying the title of the compliance officer, and the identity(ies) of the person(s) currently occupying that position, if known.
- (f) A statement that if a UCP complaint is filed directly with the CDE and the CDE determines that it merits direct intervention, the CDE shall complete an investigation and provide a written decision to the complainant within sixty (60) calendar days of receipt of the complaint, unless the parties have agreed to extend the timeline or the CDE documents exceptional circumstances and informs the complainant.
- (g) A statement that the complainant has a right to appeal the School's decision to the CDE by filing a written appeal within thirty (30) calendar days of the date of the School's decision, except if the School has used its UCP to address a complaint that is not subject to the UCP requirements.
- (h) A statement that a complainant who appeals the School's decision on a UCP complaint to the CDE shall receive a written appeal decision within sixty (60) calendar days of the CDE's receipt of the appeal, unless extended by written agreement with the complainant or the CDE documents exceptional circumstances and informs the complainant.
- (i) A statement that if the School finds merit in a UCP complaint, or the CDE finds merit in an appeal, the School shall take corrective actions consistent with the requirements of existing law that will provide a remedy to the affected student and/or parent/guardian as applicable.
- (j) A statement advising the complainant of any civil law remedies that may be available under state or federal discrimination, harassment, intimidation or bullying laws, if applicable, and of the appeal pursuant to Education Code § 262.3.
- (k) A statement that copies of the School's UCP shall be available free of charge.

COMMUNITY RELATIONS**1025-EACS**

UNIFORM COMPLAINT POLICY**Procedures**

The following procedures shall be used to address all complaints which allege that the School has violated federal or state laws or regulations enumerated in the section “Scope,” above. The compliance officer shall maintain a record of each complaint and subsequent related actions for at least three (3) calendar years.

All parties named shall be notified when a complaint is filed, when a complaint meeting or hearing is scheduled, and when a decision or ruling is made.

Step 1: Filing of Complaint

Any individual, including a person’s duly authorized representative or an interested third party, public agency, or organization may file a written complaint of alleged noncompliance or unlawful discrimination, harassment, intimidation or bullying pursuant to this Policy.

A complaint of unlawful discrimination, harassment, intimidation or bullying may be filed by an individual who alleges that that individual has personally suffered unlawful discrimination, harassment, intimidation or bullying or by one who believes any specific class of individuals has been subjected to unlawful discrimination, harassment, intimidation or bullying, or by a duly authorized representative who alleges that an individual student has been subjected to discrimination, harassment, intimidation, or bullying. An investigation of alleged unlawful discrimination, harassment, intimidation or bullying shall be initiated by filing a complaint no later than six (6) months from the date the alleged discrimination, harassment, intimidation or bullying occurred, or the complainant first obtained knowledge of the facts of the alleged discrimination, harassment, intimidation or bullying unless the time for filing is extended by the Director of Human Resources or designee, upon written request by the complainant setting forth the reasons for the extension. Such extension by the Director of Human Resources or designee shall be made in writing. The period for filing may be extended by the Director of Human Resources or designee for good cause for a period not to exceed ninety (90) calendar days following the expiration of the six-month time period. The Human Resources Manager shall respond immediately upon a receipt of a request for extension.

All other complaints under this Policy shall be filed not later than one (1) year from the date the alleged violation occurred. For complaints relating to the LCAP, the date of the alleged violation is the date on which the School Board of Directors approved the LCAP or the annual update was adopted by the School.

The complaint shall be presented to the compliance officer who shall maintain a log of complaints received, providing each with a code number and date stamp.

Complaints filed pursuant to this Policy must be in writing and signed. A signature may be handwritten, typed (including in an email) or electronically generated. Only complaints regarding pupil fees or LCAP compliance may be filed anonymously as set forth in this Policy. If a complainant is

COMMUNITY RELATIONS

1025-EACS

UNIFORM COMPLAINT POLICY

unable to put a complaint in writing due to conditions such as a disability or illiteracy, the School staff shall assist the complainant in the filing of the complaint.

Step 2: Mediation

Within three (3) business days of receiving the complaint, the compliance officer may informally discuss with the complainant the possibility of using mediation. If the complainant agrees to mediation, the compliance officer shall make arrangements for this process.

Before initiating the mediation of an unlawful discrimination, harassment, intimidation or bullying complaint, the compliance officer shall ensure that all parties agree to make the mediator a party to related confidential information.

If the mediation process does not resolve the complaint to the satisfaction of the complainant, the compliance officer shall proceed with the investigation of the complaint.

The use of mediation shall not extend the School's timelines for investigating and resolving the complaint unless the complainant agrees in writing to such an extension of time.

Step 3: Investigation of Complaint

The compliance officer is encouraged to hold an investigative meeting within five (5) business days of receiving the complaint or an unsuccessful attempt to mediate the complaint. This meeting shall provide an opportunity for the complainant and/or the complainant's representative to repeat the complaint orally.

The complainant and/or the complainant's representative shall have an opportunity to present evidence or information leading to evidence to support the allegations in the complaint.

A complainant's refusal to provide the compliance officer with documents or other evidence related to the allegations in the complaint, or a complainant's failure or refusal to cooperate in the investigation or the complainant's engagement in any other obstruction of the investigation, may result in the dismissal of the complaint because of a lack of evidence to support the allegation.

The School's refusal to provide the compliance officer with access to records and/or other information related to the allegation in the complaint, or its failure or refusal to cooperate in the investigation or its engagement in any other obstruction of the investigation, may result in a finding, based on evidence collected, that a violation has occurred and may result in the imposition of a remedy in favor of the complainant.

Step 4: Final Written Decision

The School shall issue an investigation report (the "Decision") based on the evidence. The School's Decision shall be in writing and sent to the complainant within sixty (60) calendar days of the School's

COMMUNITY RELATIONS**1025-EACS**

UNIFORM COMPLAINT POLICY

receipt unless the timeframe is extended with the written agreement of the complainant. The School's Decision shall be written in English and in the language of the complainant whenever feasible or as required by law.

The Decision shall include:

1. The findings of fact based on evidence gathered.
2. The conclusion providing a clear determination for each allegation as to whether the School is in compliance with the relevant law.
3. Corrective actions, if the School finds merit in the complaint and any are warranted or required by law.
4. Notice of the complainant's right to appeal the School's Decision within thirty (30) calendar days to the CDE, except when the School has used its UCP to address complaints that are not subject to the UCP requirements..
5. Procedures to be followed for initiating such an appeal.

If an employee is disciplined as a result of the complaint, the Decision shall simply state that effective action was taken and that the employee was informed of the School's expectations. The Decision shall not give any further information as to the nature of the disciplinary action except as required by applicable law.

Appeals to the CDE

If dissatisfied with the Decision, the complainant may appeal in writing to the CDE within thirty (30) calendar days of receiving the School's Decision. The appeal shall be accompanied by a copy of the complaint filed with the School and a copy of the Decision. When appealing to the CDE, the complainant must specify and explain the basis for the appeal, including at least one of the following:

1. The School failed to follow its complaint procedures.
2. Relative to the allegations of the complaint, the School's Decision lacks material findings of fact necessary to reach a conclusion of law.
3. The material findings of fact in the School's Decision are not supported by substantial evidence.
4. The legal conclusion in the School's Decision is inconsistent with the law.
5. In a case in which the School's Decision found noncompliance, the corrective actions fail to provide a proper remedy.

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UNIFORM COMPLAINT POLICY

Upon notification by the CDE that the complainant has appealed the School's Decision, the Director of Human Resources or designee shall forward the following documents to the CDE within ten (10) calendar days of the date of notification:

1. A copy of the original complaint.
2. A copy of the Decision.
3. A copy of the investigation file, including but not limited to all notes, interviews, and documents submitted by the parties or gathered by the investigator.
4. A report of any action taken to resolve the complaint.
5. A copy of the School's complaint procedures.
6. Other relevant information requested by the CDE.

If the CDE determines the appeal raises issues not contained in the local complaint, the CDE will refer those new issues back to the School for resolution as a new complaint. If the CDE notifies the School that its Decision failed to address an allegation raised by the complaint and subject to the UCP process, the School will investigate and address such allegation(s) in accordance with the UCP requirements and provide the CDE and the appellant with an amended Decision addressing such allegation(s) within twenty (20) calendar days of the CDE's notification. The amended Decision will inform the appellant of the right to separately appeal the amended Decision with respect to the complaint allegation(s) not addressed in the original Decision.

Within thirty (30) calendar days of the date of the CDE's appeal Decision pursuant to 5 C.C.R. section 4633(f)(2) or (3), either party may request reconsideration by the State Superintendent of Public Instruction ("SSPI") or the SSPI's designee. The request for reconsideration shall specify and explain the reason(s) for contesting the findings of fact, conclusions of law, or corrective actions in the CDE's appeal Decision. The SSPI will not consider any information not previously submitted to the CDE by a party during the appeal unless such information was unknown to the party at the time of the appeal and, with due diligence, could not have become known to the party. Pending the SSPI's response to a request for reconsideration, the CDE appeal Decision remains in effect and enforceable, unless stayed by a court.

The CDE may directly intervene in the complaint without waiting for action by the School when one of the conditions listed in Title 5, California Code of Regulations, Section 4650 exists, including but not limited to cases in which through no fault of the complainant, the School has not taken action within sixty (60) calendar days of the date the complaint was filed with the School.

Civil Law Remedies

COMMUNITY RELATIONS**1025-EACS**

UNIFORM COMPLAINT POLICY

A complainant may pursue available civil law remedies outside of the School's complaint procedures. Complainants may seek assistance from mediation centers or public/private interest attorneys. Civil law remedies that may be imposed by a court include, but are not limited to, injunctions and restraining orders. For unlawful discrimination complaints arising under state law, however, a complainant must wait until sixty (60) calendar days have elapsed from the filing of an appeal with the CDE before pursuing civil law remedies. The moratorium does not apply to injunctive relief and is applicable only if the School has appropriately, and in a timely manner, apprised the complainant of their right to file a complaint..

COMMUNITY RELATIONS

1025-EACS

UNIFORM COMPLAINT POLICY

UNIFORM COMPLAINT PROCEDURE FORM

Last Name: _____ First Name/MI: _____

Student Name (if applicable): _____ Grade: _____ Date of Birth: _____

Street Address/Apt. #: _____

City: _____ State: _____ Zip Code: _____

Home Phone: _____ Cell Phone: _____ Work Phone: _____

School/Office of alleged violation: _____

For allegation(s) of noncompliance, please check the program or activity referred to in your complaint, if applicable:

- | | | |
|---|--|---|
| <input type="checkbox"/> Adult Education | <input type="checkbox"/> Education of Students in Foster Care, Students who are Homeless, former Juvenile Court Students now enrolled in a Public School, Migratory Children and Children of Military Families | <input type="checkbox"/> Regional Occupational Centers and Programs |
| <input type="checkbox"/> Career Technical and Technical Education/Career Technical and Technical Training | <input type="checkbox"/> Every Student Succeeds Act | <input type="checkbox"/> School Plans for School Achievement |
| <input type="checkbox"/> Child Care and Development | <input type="checkbox"/> Local Control Funding Formula/ Local Control and Accountability Plan | <input type="checkbox"/> School Safety Plan |
| <input type="checkbox"/> Consolidated Categorical Aid Programs | <input type="checkbox"/> Migrant Education Programs | <input type="checkbox"/> Pupil Fees |
| | | <input type="checkbox"/> Pregnant, Parenting or Lactating Students |

For allegation(s) of unlawful discrimination, harassment, intimidation or bullying, please check the basis of the unlawful discrimination, harassment, intimidation or bullying described in your complaint, if applicable:

- | | | |
|--|---|--|
| <input type="checkbox"/> Age | <input type="checkbox"/> Gender / Gender Expression / Gender Identity | <input type="checkbox"/> Sex (Actual or Perceived) |
| <input type="checkbox"/> Ancestry | <input type="checkbox"/> Genetic Information | <input type="checkbox"/> Sexual Orientation (Actual or Perceived) |
| <input type="checkbox"/> Color | <input type="checkbox"/> Nationality/ National Origin | <input type="checkbox"/> Based on association with a person or group with one or more of these actual or perceived characteristics |
| <input type="checkbox"/> Disability (Mental or Physical) | <input type="checkbox"/> Race or Ethnicity | <input type="checkbox"/> Marital Status |
| <input type="checkbox"/> Ethnic Group Identification | <input type="checkbox"/> Religion | |
| <input type="checkbox"/> Medical Condition | | |
| <input type="checkbox"/> Immigration Status/Citizenship | | |

1. Please give facts about the complaint. Provide details such as the names of those involved, dates, whether witnesses

COMMUNITY RELATIONS

1025-EACS

UNIFORM COMPLAINT POLICY

were present, etc., that may be helpful to the complaint investigator.

- 2. Have you discussed your complaint or brought your complaint to any School personnel? If you have, to whom did you take the complaint, and what was the result?

- 3. Please provide copies of any written documents that may be relevant or supportive of your complaint.

COMMUNITY RELATIONS

1025-EACS

UNIFORM COMPLAINT POLICY

I have attached supporting documents.

Yes

No

Signature: _____ Date: _____

Mail complaint and any relevant documents to:

Megan Anderson
Assistant Director of Human Resources
1 Technology Drive, I-811
Irvine, CA 92618

COMMUNITY RELATIONS**1025-EACS****UNIFORM COMPLAINT POLICY**

It is the policy of Excel Academy Charter Schools (“EACS” or “School”) to comply with applicable federal and state laws and regulations. The School is the local agency primarily responsible for compliance with federal and state laws and regulations governing educational programs. Pursuant to this policy, persons responsible for compliance and/or conducting investigations shall be knowledgeable about the laws and programs which they are assigned to investigate. This complaint procedure is adopted to provide a uniform system of complaint processing (“UCP”) for the following types of complaints:

1. Complaints alleging unlawful discrimination, harassment, intimidation or bullying against any protected group on the basis of the actual or perceived characteristics of age, ancestry, color, mental disability, physical disability, ethnic group identification, immigration status, citizenship, gender expression, gender identity, gender, genetic information, nationality, national origin, race or ethnicity (including traits historically associated with race, including, but not limited to, hair texture and protected hairstyles such as braids, locks, and twists), religion, medical condition, marital status, sex, or sexual orientation, or on the basis of a person’s association with a person or group with one or more of these actual or perceived characteristics in any School program or activity.
2. Complaints alleging a violation of state or federal law or regulations governing the following programs:
 - a. Accommodations for Pregnant, Parenting or Lactating Students;
 - b. Adult Education;
 - c. Career Technical and Technical Education;
 - d. Career Technical and Technical Training;
 - e. Child Care and Development Programs;
 - f. Consolidated Categorical Aid;
 - g. Education of Students in Foster Care, Students who are Homeless, former Juvenile Court Students now enrolled in a public school, Migratory Children and Children of Military Families;
 - h. Every Student Succeeds Act;
 - i. Migrant Education Programs;
 - j. Regional Occupational Centers and Programs; and/or
 - k. School Safety Plans.
3. Complaints alleging that a pupil enrolled in a public school was required to pay a pupil fee for participation in an educational activity as those terms are defined below.
 - a. “Educational activity” means an activity offered by a school, school district, charter school or county office of education that constitutes an integral fundamental part of elementary and secondary education, including, but not limited to, curricular and extracurricular activities.
 - b. “Pupil fee” means a fee, deposit or other charge imposed on pupils, or a pupil’s parents or guardians, in violation of Education Code section 49011 and Section 5 of Article IX of the California Constitution, which require educational activities to be provided free of charge to all pupils without regard to their families’ ability or willingness to pay fees

COMMUNITY RELATIONS**1025-EACS****UNIFORM COMPLAINT POLICY**

or request special waivers, as provided for in *Hartzell v. Connell* (1984) 35 Cal.3d 899. A pupil fee includes, but is not limited to, all of the following:

- i. A fee charged to a pupil as a condition for registering for school or classes, or as a condition for participation in a class or an extracurricular activity, regardless of whether the class or activity is elective or compulsory or is for credit.
 - ii. A security deposit, or other payment, that a pupil is required to make to obtain a lock, locker, book, class apparatus, musical instrument, uniform or other materials or equipment.
 - iii. A purchase that a pupil is required to make to obtain materials, supplies, equipment or uniforms associated with an educational activity.
- c. A pupil fees complaint and complaints regarding local control and accountability plans (“LCAP”) only, may be filed anonymously (without an identifying signature), if the complaint provides evidence or information leading to evidence to support an allegation of noncompliance with Education Code sections 52060 - 52077, including an allegation of a violation of Education Code sections 47606.5 or 47607.3, as referenced in Education Code section 52075, regarding local control and accountability plans.
- d. If the School finds merit in a pupil fees complaint, or the California Department of Education (“CDE”) finds merit in an appeal, the School shall provide a remedy to all affected pupils, parents, and guardians that, where applicable, includes reasonable efforts by the School to ensure full reimbursement to all affected pupils, parents, and guardians, subject to procedures established through regulations adopted by the state board.
- e. Nothing in this policy shall be interpreted to prohibit solicitation of voluntary donations of funds or property, voluntary participation in fundraising activities, or the School and other entities from providing pupils prizes or other recognition for voluntarily participating in fundraising activities.
4. Complaints alleging noncompliance with the requirements governing the Local Control Funding Formula (“LCFF”), LCAP under Education Code sections 47606.5 and 47607.3, as applicable. If the School adopts a School Plan for Student Achievement in addition to its LCAP, complaints of noncompliance with the requirements of the School Plan for Student Achievement under Education Code sections 64000, 64001, 65000, and 65001 shall also fall under this Policy.
5. Complaints alleging noncompliance regarding child nutrition programs established pursuant to Education Code sections 49490-49590 are governed by Title 7, Code of Federal Regulations (“C.F.R.”) sections 210.19(a)(4), 215.1(a), 220.13(c), 225.11(b), 226.6(n), and 250.15(d) and Title 5, California Code of Regulations (“C.C.R.”) sections 15580 - 15584.

COMMUNITY RELATIONS**1025-EACS****UNIFORM COMPLAINT POLICY**

6. Complaints alleging noncompliance regarding special education programs established pursuant to Education Code sections 56000-56865 and 59000-59300 are governed by the procedures set forth in 5 C.C.R. sections 3200-3205 and 34 C.F.R. sections 300.151-300.153.
7. **Complaints alleging noncompliance regarding teacher vacancy or miss assignments as follows:**
 - a. **A teacher who lacks credentials or training to teach English Learners is assigned to teach a class with one or more English Learner pupils in the class. This subparagraph does not relieve a school district from complying with state or federal law regarding teachers of English language learners.**

The School acknowledges and respects every individual's rights to privacy. Unlawful discrimination, harassment, intimidation or bullying complaints shall be investigated in a manner that protects (to the greatest extent reasonably possible and as permitted by law) the confidentiality of the parties, including but not limited to the identity of the complainant, and maintains the integrity of the process. The School cannot guarantee anonymity of the complainant. This includes keeping the identity of the complainant confidential. However, the School will attempt to do so as appropriate. The School may find it necessary to disclose information regarding the complaint/complainant to the extent required by law or necessary to carry out the investigation or proceedings, as determined by the Director of Human Resources or designee on a case-by-case basis. The School shall ensure that complainants are protected from retaliation.

Compliance Officer(s)

The Board of Directors designates the following compliance officer(s) to receive and investigate complaints and to ensure the School's compliance with law:

Megan Anderson
 Assistant Director of Human Resources
 1 Technology Drive, I-811
 Irvine, CA 92618

The Executive Director, or designee shall ensure that the compliance officer(s) designated to investigate complaints are knowledgeable about the laws and programs for which they are responsible. The compliance officer may have access to legal counsel as determined by the Executive Director, or designee.

Should a complaint be filed against the Executive Director, the compliance officer for that case shall be the President of the Board of Directors.

Notifications

The Executive Director or designee shall make available copies of this Policy free of charge. The annual notice of this Policy may be made available on the School's website.

COMMUNITY RELATIONS**1025-EACS****UNIFORM COMPLAINT POLICY**

The School shall annually provide written notification of the School's UCP to employees, students, parents and/or guardians, advisory committees, private school officials or representatives, and other interested parties as applicable.

The annual notice shall be in English. When necessary under Education Code section 48985, if fifteen (15) percent or more of the pupils enrolled in the School speak a single primary language other than English, this annual notice will also be provided to the parent/guardian of any such students in their primary language.

The annual notice shall include the following:

- (a) A list of the types of complaints that fall under the scope of the UCP and the state and federal provisions that govern complaints regarding child nutrition programs and special education programs.
- (b) A statement clearly identifying any California State preschool programs that the School is operating as exempt from licensing pursuant to Health and Safety Code section 1596.792(o) and corresponding Title 5 health and safety regulations, and any California State preschool programs that the School is operating pursuant to Title 22 licensing requirements.
- (c) A statement that the School is primarily responsible for compliance with federal and state laws and regulations.
- (d) A statement that a pupil enrolled in a public school shall not be required to pay a pupil fee for participation in an educational activity.
- (e) A statement identifying the title of the compliance officer, and the identity(ies) of the person(s) currently occupying that position, if known.
- (f) A statement that if a UCP complaint is filed directly with the CDE and the CDE determines that it merits direct intervention, the CDE shall complete an investigation and provide a written decision to the complainant within sixty (60) calendar days of receipt of the complaint, unless the parties have agreed to extend the timeline or the CDE documents exceptional circumstances and informs the complainant.
- (g) A statement that the complainant has a right to appeal the School's decision to the CDE by filing a written appeal within thirty (30) calendar days of the date of the School's decision, except if the School has used its UCP to address a complaint that is not subject to the UCP requirements.
- (h) A statement that a complainant who appeals the School's decision on a UCP complaint to the CDE shall receive a written appeal decision within sixty (60) calendar days of the CDE's receipt of the appeal, unless extended by written agreement with the complainant or the CDE documents exceptional circumstances and informs the complainant.
- (i) A statement that if the School finds merit in a UCP complaint, or the CDE finds merit in an appeal, the School shall take corrective actions consistent with the requirements of existing law that will provide a remedy to the affected student and/or parent/guardian as applicable.
- (j) A statement advising the complainant of any civil law remedies that may be available under state or federal discrimination, harassment, intimidation or bullying laws, if applicable, and of the appeal pursuant to Education Code § 262.3.
- (k) A statement that copies of the School's UCP shall be available free of charge.

COMMUNITY RELATIONS**1025-EACS**

UNIFORM COMPLAINT POLICY**Procedures**

The following procedures shall be used to address all complaints which allege that the School has violated federal or state laws or regulations enumerated in the section “Scope,” above. The compliance officer shall maintain a record of each complaint and subsequent related actions for at least three (3) calendar years.

All parties named shall be notified when a complaint is filed, when a complaint meeting or hearing is scheduled, and when a decision or ruling is made.

Step 1: Filing of Complaint

Any individual, including a person’s duly authorized representative or an interested third party, public agency, or organization may file a written complaint of alleged noncompliance or unlawful discrimination, harassment, intimidation or bullying pursuant to this Policy.

A complaint of unlawful discrimination, harassment, intimidation or bullying may be filed by an individual who alleges that that individual has personally suffered unlawful discrimination, harassment, intimidation or bullying or by one who believes any specific class of individuals has been subjected to unlawful discrimination, harassment, intimidation or bullying, or by a duly authorized representative who alleges that an individual student has been subjected to discrimination, harassment, intimidation, or bullying. An investigation of alleged unlawful discrimination, harassment, intimidation or bullying shall be initiated by filing a complaint no later than six (6) months from the date the alleged discrimination, harassment, intimidation or bullying occurred, or the complainant first obtained knowledge of the facts of the alleged discrimination, harassment, intimidation or bullying unless the time for filing is extended by the Director of Human Resources or designee, upon written request by the complainant setting forth the reasons for the extension. Such extension by the Director of Human Resources or designee shall be made in writing. The period for filing may be extended by the Director of Human Resources or designee for good cause for a period not to exceed ninety (90) calendar days following the expiration of the six-month time period. The Human Resources Manager shall respond immediately upon a receipt of a request for extension.

All other complaints under this Policy shall be filed not later than one (1) year from the date the alleged violation occurred. For complaints relating to the LCAP, the date of the alleged violation is the date on which the School Board of Directors approved the LCAP or the annual update was adopted by the School.

The complaint shall be presented to the compliance officer who shall maintain a log of complaints received, providing each with a code number and date stamp.

Complaints filed pursuant to this Policy must be in writing and signed. A signature may be handwritten, typed (including in an email) or electronically generated. Only complaints regarding pupil fees or LCAP compliance may be filed anonymously as set forth in this Policy. If a complainant is

COMMUNITY RELATIONS

1025-EACS

UNIFORM COMPLAINT POLICY

unable to put a complaint in writing due to conditions such as a disability or illiteracy, the School staff shall assist the complainant in the filing of the complaint.

Step 2: Mediation

Within three (3) business days of receiving the complaint, the compliance officer may informally discuss with the complainant the possibility of using mediation. If the complainant agrees to mediation, the compliance officer shall make arrangements for this process.

Before initiating the mediation of an unlawful discrimination, harassment, intimidation or bullying complaint, the compliance officer shall ensure that all parties agree to make the mediator a party to related confidential information.

If the mediation process does not resolve the complaint to the satisfaction of the complainant, the compliance officer shall proceed with the investigation of the complaint.

The use of mediation shall not extend the School's timelines for investigating and resolving the complaint unless the complainant agrees in writing to such an extension of time.

Step 3: Investigation of Complaint

The compliance officer is encouraged to hold an investigative meeting within five (5) business days of receiving the complaint or an unsuccessful attempt to mediate the complaint. This meeting shall provide an opportunity for the complainant and/or the complainant's representative to repeat the complaint orally.

The complainant and/or the complainant's representative shall have an opportunity to present evidence or information leading to evidence to support the allegations in the complaint.

A complainant's refusal to provide the compliance officer with documents or other evidence related to the allegations in the complaint, or a complainant's failure or refusal to cooperate in the investigation or the complainant's engagement in any other obstruction of the investigation, may result in the dismissal of the complaint because of a lack of evidence to support the allegation.

The School's refusal to provide the compliance officer with access to records and/or other information related to the allegation in the complaint, or its failure or refusal to cooperate in the investigation or its engagement in any other obstruction of the investigation, may result in a finding, based on evidence collected, that a violation has occurred and may result in the imposition of a remedy in favor of the complainant.

Step 4: Final Written Decision

The School shall issue an investigation report (the "Decision") based on the evidence. The School's Decision shall be in writing and sent to the complainant within sixty (60) calendar days of the School's

COMMUNITY RELATIONS**1025-EACS**

UNIFORM COMPLAINT POLICY

receipt unless the timeframe is extended with the written agreement of the complainant. The School's Decision shall be written in English and in the language of the complainant whenever feasible or as required by law.

The Decision shall include:

1. The findings of fact based on evidence gathered.
2. The conclusion providing a clear determination for each allegation as to whether the School is in compliance with the relevant law.
3. Corrective actions, if the School finds merit in the complaint and any are warranted or required by law.
4. Notice of the complainant's right to appeal the School's Decision within thirty (30) calendar days to the CDE, except when the School has used its UCP to address complaints that are not subject to the UCP requirements..
5. Procedures to be followed for initiating such an appeal.

If an employee is disciplined as a result of the complaint, the Decision shall simply state that effective action was taken and that the employee was informed of the School's expectations. The Decision shall not give any further information as to the nature of the disciplinary action except as required by applicable law.

Appeals to the CDE

If dissatisfied with the Decision, the complainant may appeal in writing to the CDE within thirty (30) calendar days of receiving the School's Decision. The appeal shall be accompanied by a copy of the complaint filed with the School and a copy of the Decision. When appealing to the CDE, the complainant must specify and explain the basis for the appeal, including at least one of the following:

1. The School failed to follow its complaint procedures.
2. Relative to the allegations of the complaint, the School's Decision lacks material findings of fact necessary to reach a conclusion of law.
3. The material findings of fact in the School's Decision are not supported by substantial evidence.
4. The legal conclusion in the School's Decision is inconsistent with the law.
5. In a case in which the School's Decision found noncompliance, the corrective actions fail to provide a proper remedy.

COMMUNITY RELATIONS**1025-EACS**

UNIFORM COMPLAINT POLICY

Upon notification by the CDE that the complainant has appealed the School's Decision, the Director of Human Resources or designee shall forward the following documents to the CDE within ten (10) calendar days of the date of notification:

1. A copy of the original complaint.
2. A copy of the Decision.
3. A copy of the investigation file, including but not limited to all notes, interviews, and documents submitted by the parties or gathered by the investigator.
4. A report of any action taken to resolve the complaint.
5. A copy of the School's complaint procedures.
6. Other relevant information requested by the CDE.

If the CDE determines the appeal raises issues not contained in the local complaint, the CDE will refer those new issues back to the School for resolution as a new complaint. If the CDE notifies the School that its Decision failed to address an allegation raised by the complaint and subject to the UCP process, the School will investigate and address such allegation(s) in accordance with the UCP requirements and provide the CDE and the appellant with an amended Decision addressing such allegation(s) within twenty (20) calendar days of the CDE's notification. The amended Decision will inform the appellant of the right to separately appeal the amended Decision with respect to the complaint allegation(s) not addressed in the original Decision.

Within thirty (30) calendar days of the date of the CDE's appeal Decision pursuant to 5 C.C.R. section 4633(f)(2) or (3), either party may request reconsideration by the State Superintendent of Public Instruction ("SSPI") or the SSPI's designee. The request for reconsideration shall specify and explain the reason(s) for contesting the findings of fact, conclusions of law, or corrective actions in the CDE's appeal Decision. The SSPI will not consider any information not previously submitted to the CDE by a party during the appeal unless such information was unknown to the party at the time of the appeal and, with due diligence, could not have become known to the party. Pending the SSPI's response to a request for reconsideration, the CDE appeal Decision remains in effect and enforceable, unless stayed by a court.

The CDE may directly intervene in the complaint without waiting for action by the School when one of the conditions listed in Title 5, California Code of Regulations, Section 4650 exists, including but not limited to cases in which through no fault of the complainant, the School has not taken action within sixty (60) calendar days of the date the complaint was filed with the School.

Civil Law Remedies

COMMUNITY RELATIONS**1025-EACS**

UNIFORM COMPLAINT POLICY

A complainant may pursue available civil law remedies outside of the School's complaint procedures. Complainants may seek assistance from mediation centers or public/private interest attorneys. Civil law remedies that may be imposed by a court include, but are not limited to, injunctions and restraining orders. For unlawful discrimination complaints arising under state law, however, a complainant must wait until sixty (60) calendar days have elapsed from the filing of an appeal with the CDE before pursuing civil law remedies. The moratorium does not apply to injunctive relief and is applicable only if the School has appropriately, and in a timely manner, apprised the complainant of their right to file a complaint..

COMMUNITY RELATIONS

1025-EACS

UNIFORM COMPLAINT POLICY

UNIFORM COMPLAINT PROCEDURE FORM

Last Name: _____ First Name/MI: _____

Student Name (if applicable): _____ Grade: _____ Date of Birth: _____

Street Address/Apt. #: _____

City: _____ State: _____ Zip Code: _____

Home Phone: _____ Cell Phone: _____ Work Phone: _____

School/Office of alleged violation: _____

For allegation(s) of noncompliance, please check the program or activity referred to in your complaint, if applicable:

- | | | |
|---|--|---|
| <input type="checkbox"/> Adult Education | <input type="checkbox"/> Education of Students in Foster Care, Students who are Homeless, former Juvenile Court Students now enrolled in a Public School, Migratory Children and Children of Military Families | <input type="checkbox"/> Regional Occupational Centers and Programs |
| <input type="checkbox"/> Career Technical and Technical Education/Career Technical and Technical Training | <input type="checkbox"/> Every Student Succeeds Act | <input type="checkbox"/> School Plans for School Achievement |
| <input type="checkbox"/> Child Care and Development | <input type="checkbox"/> Local Control Funding Formula/ Local Control and Accountability Plan | <input type="checkbox"/> School Safety Plan |
| <input type="checkbox"/> Consolidated Categorical Aid Programs | <input type="checkbox"/> Migrant Education Programs | <input type="checkbox"/> Pupil Fees |
| | | <input type="checkbox"/> Pregnant, Parenting or Lactating Students |

For allegation(s) of unlawful discrimination, harassment, intimidation or bullying, please check the basis of the unlawful discrimination, harassment, intimidation or bullying described in your complaint, if applicable:

- | | | |
|--|---|--|
| <input type="checkbox"/> Age | <input type="checkbox"/> Gender / Gender Expression / Gender Identity | <input type="checkbox"/> Sex (Actual or Perceived) |
| <input type="checkbox"/> Ancestry | <input type="checkbox"/> Genetic Information | <input type="checkbox"/> Sexual Orientation (Actual or Perceived) |
| <input type="checkbox"/> Color | <input type="checkbox"/> Nationality/ National Origin | <input type="checkbox"/> Based on association with a person or group with one or more of these actual or perceived characteristics |
| <input type="checkbox"/> Disability (Mental or Physical) | <input type="checkbox"/> Race or Ethnicity | <input type="checkbox"/> Marital Status |
| <input type="checkbox"/> Ethnic Group Identification | <input type="checkbox"/> Religion | |
| <input type="checkbox"/> Medical Condition | | |
| <input type="checkbox"/> Immigration Status/Citizenship | | |

1. Please give facts about the complaint. Provide details such as the names of those involved, dates, whether witnesses

COMMUNITY RELATIONS

1025-EACS

UNIFORM COMPLAINT POLICY

were present, etc., that may be helpful to the complaint investigator.

2. Have you discussed your complaint or brought your complaint to any School personnel? If you have, to whom did you take the complaint, and what was the result?

3. Please provide copies of any written documents that may be relevant or supportive of your complaint.

COMMUNITY RELATIONS

1025-EACS

UNIFORM COMPLAINT POLICY

I have attached supporting documents.

Yes

No

Signature: _____ Date: _____

Mail complaint and any relevant documents to:

Megan Anderson
Assistant Director of Human Resources
1 Technology Drive, I-811
Irvine, CA 92618

Coversheet

Administer Oath of Office

Section: XII. Board Governance
Item: B. Administer Oath of Office
Purpose:
Submitted by:
Related Material: _EACS_OATH_-_TEMPLATE.docx.pdf

**EXCEL ACADEMY CHARTER SCHOOL
OATH OF OFFICE FOR BOARD OF DIRECTORS**

State of California

I, _____ do solemnly swear (or affirm) that I will support and defend the Constitution of the State of California against all enemies, foreign and domestic; that I will bear true faith and allegiance to the Constitution of the United States and the Constitution of the State of California; that I take this obligation freely, without any mental reservation or purpose of evasion; and that I will well and faithfully discharge the duties upon which I am about to enter.

Signature of Board of Director

Taken, subscribed, and sworn (or affirmed) to be this _____ day of _____ 20____.

Signature of Authorized Official

Coversheet

Approval of the 2023-2024 Annual Board Evaluation

Section: XII. Board Governance
Item: C. Approval of the 2023-2024 Annual Board Evaluation
Purpose: Vote
Submitted by:
Related Material: Excel_Academy_Board_Evaluation_2022-23_-_Master.pdf



Excel Academy Charter Schools Annual Board Evaluation

2022 - 2023

Issue/Concept	Complete	In Progress	Little/No Progress	Not Applicable
A Solid Foundation				
School has a well drafted charter contract with its sponsoring agencies.	WH MH SH LA SF			
School has well-drafted articles and bylaws.	WH MH SH LA SF			
School's legal and financial status are clear and well understood.	WH MH SH			

	<i>LA</i> <i>SF</i>			
Appropriate liability insurance and risk management practices are maintained at all times.	<i>MH</i> <i>SH</i> <i>SF</i>	<i>WH</i> <i>LA</i>		
School has developed a long-term /strategic plan such as a WASC report that is reviewed and revised on an annual basis.	<i>WH</i> <i>MH</i> <i>SH</i> <i>LA</i> <i>SF</i>			
Long-term plans are translated into annual action plans/goals in a document such as the LCAP.	<i>WH</i> <i>MH</i> <i>SH</i> <i>LA</i> <i>SF</i>			
Board Operations/Relations				
Board members understand their legal and ethical responsibilities (duty of care/loyalty, conflict of interest).	<i>WH</i> <i>MH</i> <i>SH</i> <i>LA</i> <i>SF</i>			
New board members are oriented and fully briefed prior to being seated.	<i>MH</i> <i>SH</i>	<i>WH</i> <i>SF</i>	<i>LA</i>	
Board is composed of individuals with a broad and appropriate range of expertise and experience. Board seeks outside counsel for matters beyond its expertise.	<i>WH</i> <i>MH</i> <i>SH</i> <i>LA</i> <i>SF</i>			
Board member selection process ensures a board and appropriate range of expertise and experience.	<i>WH</i> <i>MH</i>	<i>LA</i>		

	SH SF			
Board conducts annual self-evaluation.	MH SH SF WH LA			
Meetings are well planned with clear agendas focused on appropriate policy and action items.	WH MH SH LA SF			
Board president is a strong, capable meeting facilitator.	WH MH SH SF LA			
Board president has developed meeting norms.	WH MH SH LA SF			
Meetings are conducted pursuant to common ground rules (eg. Robert's Rules) that are well understood by all members.	WH MH SH LA SF			
Individual board members prepare for meetings and participate constructively.	MH SH SF	WH LA		
Meeting minutes record each board meeting and are	WH			

distributed promptly on the school's website after each meeting.	MH SH LA SF			
Relationship w/CEO				
Board develops performance goals and evaluates CEO performance each year.	WH MH SH LA SF			
Board has clear understanding with staff regarding where board responsibility should be to support and maximize the functioning of the schools.	WH MH SH LA SF			
Board has established a plan for succession in the event the CEO leaves/retires.		MH WH SH LA SF		
Personnel and Staffing				
Board has adopted/approved a comprehensive set of personnel policies that are in line with all applicable state/federal laws & regulations. Policies are updated and an annual review will be conducted.	WH SH LA SF	MH		
Clear job descriptions and staffing plans are in place.	WH MH SH LA SF			

Budget and Finance				
Board adopts an annual budget that maximizes the school's resources in support of mission/vision.	WH MH SH LA SF			
Board monitors the budget throughout the year via monthly updates, first interim budget and second interim budget.	WH MH SH LA SF			
Board contracts with an independent auditor each year, reviews the audit report, and takes any needed follow-up action.	WH MH SH LA SF			
Board has adopted a three year financial plan in coordination with the school's overall three year plan (WASC, LCAP).	WH MH SH LA SF			
Board has adopted a comprehensive set of fiscal management and control policies.	WH MH SH LA SF			
Instruction, Curriculum, and Assessment				
Board has adopted/approved the school's curriculum and instructional programs.	WH MH SH LA			

	<i>SF</i>			
Board has adopted/approved student achievement goals/standards.	<i>WH MH SH LA SF</i>			
A broad based assessment system is in place to measure progress toward instructional goals/standards.	<i>WH MH SH LA SF</i>			
The Instructional program is in alignment with the state requirements and terms of charter.	<i>WH MH SH LA SF</i>			
Student assessment data is assembled in a comprehensive, coherent fashion, presented to the board, and reviewed and analyzed in-depth on a regular basis.	<i>WH MH SH SF</i>	<i>LA</i>		
School reports on student achievement to charter granting agencies on a regular basis as part of the ongoing oversight and renewal process.	<i>WH MH SH LA SF</i>			

Board Member Comments on Strengths:

Bill: The Excel Board of directors is a collaborative body who has a unity of purpose to ensure Excel's success in its mission to serve the needs of a diverse population. Our primary role is fiduciary, which involves both fiscal health and the expressed mission of Excel Academy.

Susan:

1. All Board members are previous school administrators.
2. All Board members share a common vision for school excellence and student success.
3. All Board members work collaboratively as a team.
4. All Board members communicate, listen, agree, and disagree openly and respectfully with one another.
5. All Board members work collaboratively with the CEOs and Superintendent to achieve school success.

Larry: The Board has a focus on what is best for students with no hidden agendas.

All Board members contribute to the conversation and issues at hand.

Steve: Heidi and her entire team have established Excel Academy as one of the most outstanding Charter Schools in the State. They are to be commended for another year of hard work, dedication and excellence.

Board Member Comments on Areas of Growth and Future Needs:

Bill: I look forward to discussing this with my fellow board members.

Susan:

1. Continue having complete and open communication with CEOs, the Superintendent, and school leadership team in order to make informed decisions.
2. Continue developing positive relationships with the CEOs, the Superintendent, and school leadership team.
3. Continue using meeting times effectively.

Larry: All Board members need to be proficient with computer skills and zoom applications related to the smooth functioning of a Board Meeting. We have many oops moments. A study session should be done at the beginning of each school year. Maybe a needs assessment of each member's skill level.

Steve: Continue to add quality staff members to their program as needed.

Coversheet

Approval of Unaudited Actuals for the 2022-2023 School Year

Section: XIII. Business/Financial Services
Item: A. Approval of Unaudited Actuals for the 2022-2023 School Year
Purpose: Vote
Submitted by:
Related Material: 23-09-14 Unaudited Actuals Final 1.pptx.pdf
Warner.pdf
Helendale.pdf

BACKGROUND:

In accordance with the stipulations outlined in the Memorandum of Understanding between Excel Academy Charter Schools and the authorizing districts, it is mandated that the unaudited actuals of revenues and expenditures from the preceding fiscal year receive approval from the Board of Directors no later than September 15 of each year. These unaudited actuals will undergo meticulous scrutiny by independent auditors and subsequently be featured in an annual independent audit report, which must be submitted to the state by December 15th. After the independent audit report is completed, the Independent Auditor's Report will be presented to the Board of Directors before the conclusion of January 2024.

RECOMMENDATION:

It is recommended that the Board of Directors approve the 2022/23 Unaudited Actuals as presented.

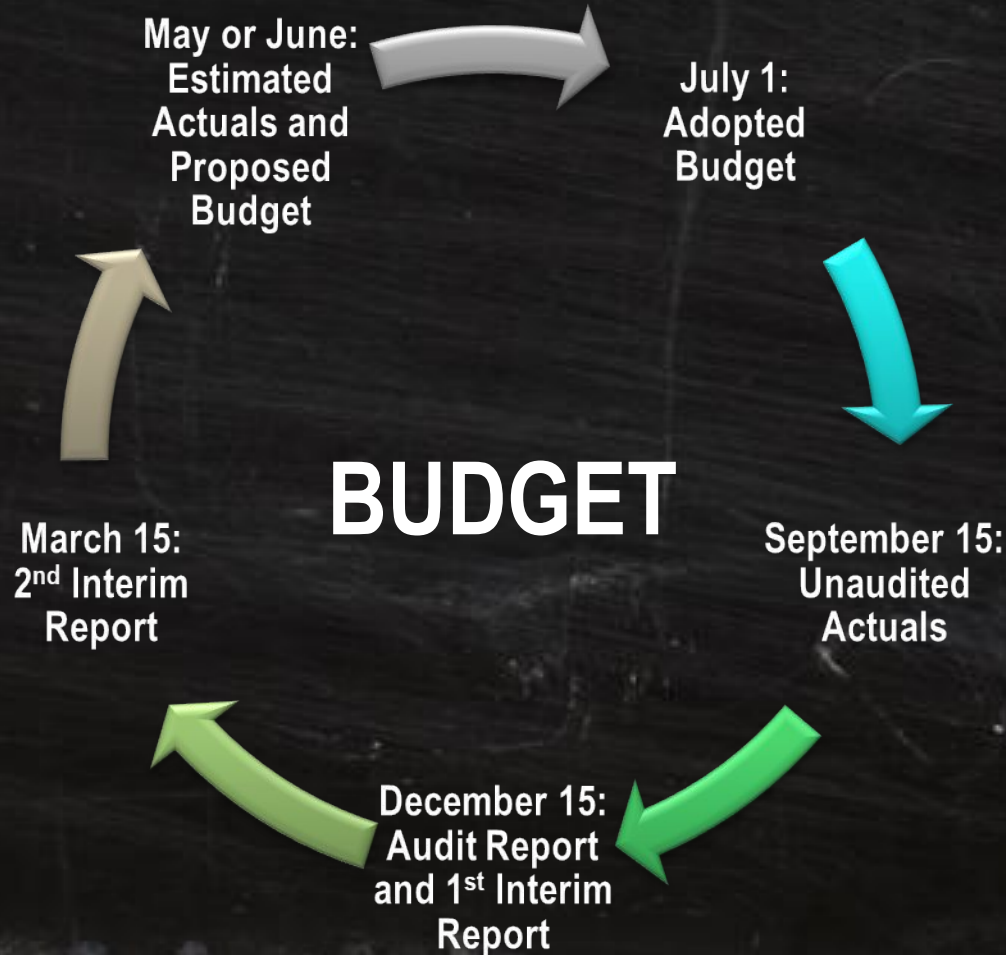
Excel Academy Charter Schools Unaudited Actuals FY2022-23 September 14, 2023



Presentation Overview

- **Budget Cycle**
- **How do we get paid**
- **Where did we spend our money**
- **Historical Analysis**
- **Next Steps**

The Budget Cycle



March 15:
2nd Interim
Report

May or June:
Estimated
Actuals and
Proposed
Budget

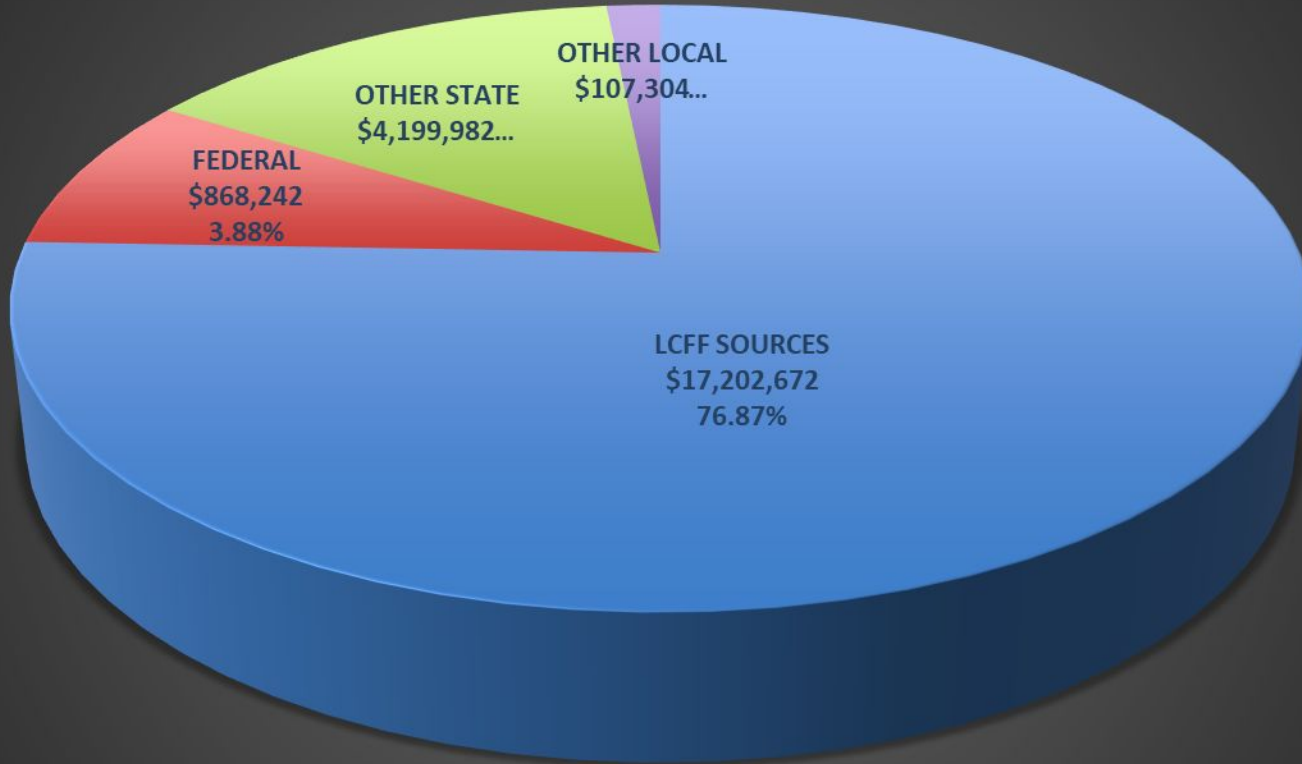
July 1:
Adopted
Budget

September 15:
Unaudited
Actuals

December 15:
Audit Report
and 1st Interim
Report

FY2022-23 Actual Revenues

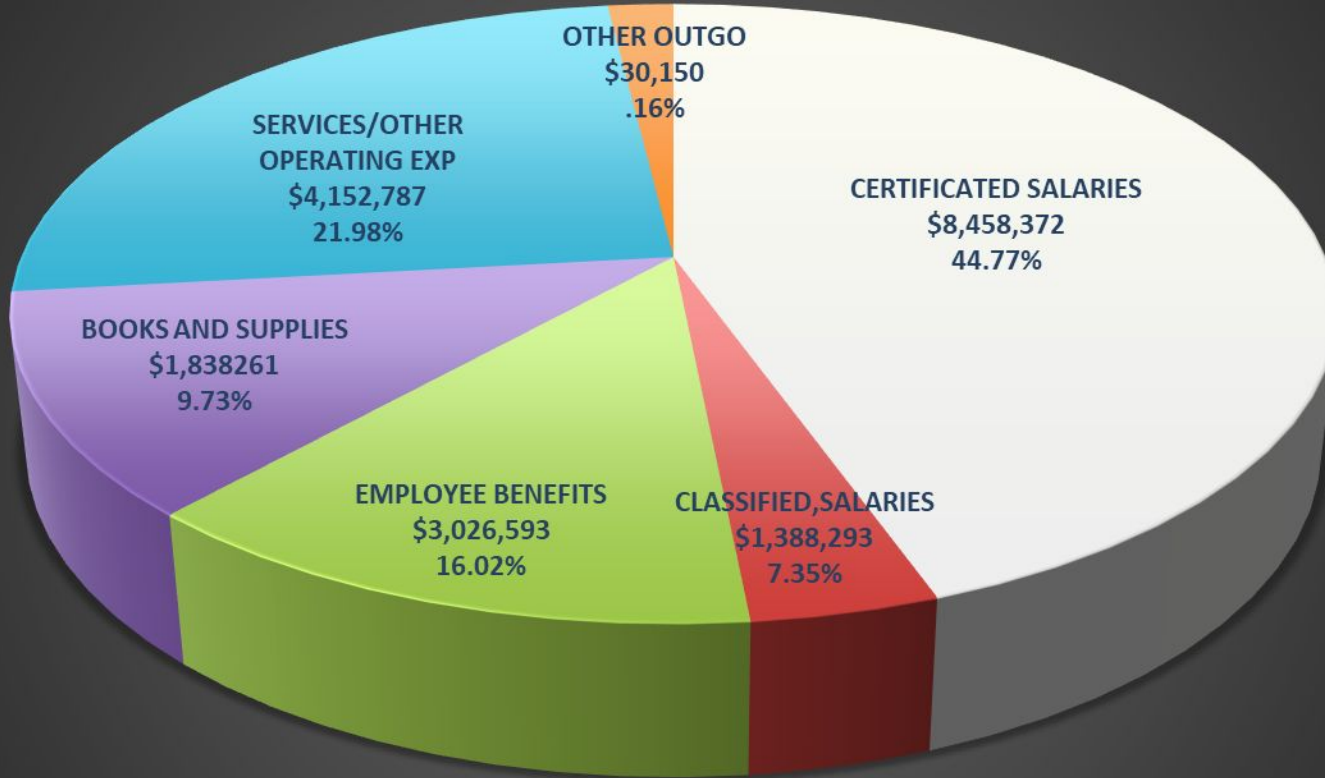
Combined Revenues



■ LCFF SOURCES ■ FEDERAL REVENUES ■ OTHER STATE REVENUE ■ OTHER LOCAL REVENUE

FY2022-23 Actual Expenditures

Combined Expenses



- CERTIFICATED SALARIES
- CLASSIFIED, SALARIES
- EMPLOYEE BENEFITS
- BOOKS AND SUPPLIES
- SERVICES/OTHER OPERATING EXP
- OTHER OUTGO

Comparative Analysis



Next Steps:

- **December 15, 2023 - Audit Report**
- **December 15, 2023 - First Interim Budget**
- **March 15, 2024 – Second Interim**
- **June 30, 2024 - FY 24-25 Budget Adoption**



Excel Academy Charter
Warner Unified
San Diego County

2022-23 Unaudited Actuals
Charter School Alternative Form
Certification

37 75416 0139386
Form ALT
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CHARTER SCHOOL UNAUDITED ACTUALS
FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2022 to June 30, 2023

CHARTER SCHOOL CERTIFICATION

Charter School Name: Excel Academy Charter
CDS #: 37-75416-0139386
Charter Approving Entity: Warner Unified
County: San Diego
Charter #: 2053

NOTE: An Alternative Form submitted to the California Department of Education will not be considered a valid submission if the following information is missing:

For information regarding this report, please contact:

<u>For County Fiscal Contact:</u>	<u>For Approving Entity:</u>	<u>For Charter School:</u>
Roxana Travers	Andrea Sissons	Joe Sorrera
Name	Name	Name
Financial Accounting and Data Support Mgr.	Superintendent/Chief Business Officer	Director of Business Services
Title	Title	Title
858-295-6700	760-782-3517	949-387-7822
Telephone	Telephone	Telephone
roxana.travers@sdcoe.net	andrea.sissons@warnerusd.net	jsorrera@excelacademy.education
Email address	Email address	Email address

To the entity that approved the charter school:

X 2022-23 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to Education Code Section 42100(b).

Signed: _____ Date: _____
Charter School Official
(Original signature required)
Printed Name: Heidi Gasca Title: Executive Director/CEO

To the County Superintendent of Schools:

X 2022-23 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to Education Code Section 42100(a).

Signed: _____ Date: _____
Authorized Representative of
Charter Approving Entity
(Original signature required)
Printed Name: Andrea Sissons Title: Superintendent/CBO

To the Superintendent of Public Instruction:

2022-23 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been verified for mathematical accuracy by the County Superintendent of Schools pursuant to Education Code Section 42100(a).

Signed: _____ Date: _____
County Superintendent/Designee
(Original signature required)

CHARTER SCHOOL UNAUDITED ACTUALS

FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2022 to June 30, 2023

Charter School Name: Excel Academy Charter
 CDS #: 37-75416-0139386
 Charter Approving Entity: Warner Unified
 County: San Diego
 Charter #: 2053

This charter school uses the following basis of accounting:

(Please enter an "X" in the applicable box below; check only one box)

- X **Accrual Basis (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)**
- Modified Accrual Basis (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)**

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	10,317,925.00		10,317,925.00
Education Protection Account State Aid - Current Year	8012	211,002.00		211,002.00
State Aid - Prior Years	8019	4,790.60		4,790.60
Transfers to Charter Schools in Lieu of Property Taxes	8096	894,353.00		894,353.00
Other LCFF Transfers	8091, 8097	0.00	0.00	0.00
Total, LCFF Sources		11,428,070.60	0.00	11,428,070.60
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		203,229.00	203,229.00
Special Education - Federal	8181, 8182		247,032.00	247,032.00
Child Nutrition - Federal	8220		0.00	0.00
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299		150,743.00	150,743.00
Total, Federal Revenues		0.00	601,004.00	601,004.00
3. Other State Revenues				
Special Education - State	StateRev SE		1,074,089.33	1,074,089.33
All Other State Revenues	StateRev AO	213,275.44	1,487,095.42	1,700,370.86
Total, Other State Revenues		213,275.44	2,561,184.75	2,774,460.19
4. Other Local Revenues				
All Other Local Revenues	LocalRev AO	98,195.58	5,871.00	104,066.58
Total, Local Revenues		98,195.58	5,871.00	104,066.58
5. TOTAL REVENUES				
		11,739,541.62	3,168,059.75	14,907,601.37
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	3,412,667.68	700,609.61	4,113,277.29
Certificated Pupil Support Salaries	1200	113,185.01	328,812.35	441,997.36
Certificated Supervisors' and Administrators' Salaries	1300	724,767.95	315,786.45	1,040,554.40
Other Certificated Salaries	1900	101,168.15	0.00	101,168.15
Total, Certificated Salaries		4,351,788.79	1,345,208.41	5,696,997.20
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	16,450.56	99,382.00	115,832.56
Noncertificated Support Salaries	2200	0.00	0.00	0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	191,305.90	0.00	191,305.90
Clerical, Technical and Office Salaries	2400	583,899.89	42,430.23	626,330.12
Other Noncertificated Salaries	2900	0.00	0.00	0.00
Total, Noncertificated Salaries		791,656.35	141,812.23	933,468.58
3. Employee Benefits				
STRS	3101-3102	523,073.06	527,151.47	1,050,224.53
PERS	3201-3202	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	124,769.12	29,175.52	153,944.64

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Health and Welfare Benefits	3401-3402	623,920.11	109,654.32	733,574.43
Unemployment Insurance	3501-3502	10,200.90	4,515.13	14,716.03
Workers' Compensation Insurance	3601-3602	28,256.74	8,538.78	36,795.52
OPEB, Allocated	3701-3702	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00
Other Employee Benefits	3901-3902	57,944.68	12,910.47	70,855.15
Total, Employee Benefits		1,368,164.61	691,945.69	2,060,110.30
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	554,336.91	105,189.86	659,526.77
Books and Other Reference Materials	4200	0.00	0.00	0.00
Materials and Supplies	4300	408,619.22	65,543.83	474,163.05
Noncapitalized Equipment	4400	19,578.84	1,545.68	21,124.52
Food	4700	0.00	0.00	0.00
Total, Books and Supplies		982,534.97	172,279.37	1,154,814.34
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	10,047.00	230,439.74	240,486.74
Travel and Conferences	5200	37,376.42	47,841.18	85,217.60
Dues and Memberships	5300	40,962.58	14,567.35	55,529.93
Insurance	5400	48,931.81	0.00	48,931.81
Operations and Housekeeping Services	5500	0.00	0.00	0.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	63,025.82	0.00	63,025.82
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00
Professional/Consulting Services and Operating Expend.	5800	2,176,060.46	73,075.40	2,249,135.86
Communications	5900	61,632.18	56.63	61,688.81
Total, Services and Other Operating Expenditures		2,438,036.27	365,980.30	2,804,016.57
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major				
Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	0.00	0.00	0.00
Amortization Expense - Lease Assets	6910	0.00	0.00	0.00
Total, Capital Outlay		0.00	0.00	0.00
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	0.00	0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE		0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7281-7299	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	0.00	0.00	0.00
Debt Service:				
Interest	7438	2,268.00	0.00	2,268.00
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		2,268.00	0.00	2,268.00
Total, Other Outgo		2,268.00	0.00	2,268.00
8. TOTAL EXPENDITURES		9,934,448.99	2,717,226.00	12,651,674.99
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		1,805,092.63	450,833.75	2,255,926.38
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979	0.00	0.00	0.00

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Less:					
2. Other Uses	7630-7699	0.00	0.00	0.00	
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(402,801.89)	402,801.89	0.00	
4. TOTAL OTHER FINANCING SOURCES / USES		(402,801.89)	402,801.89	0.00	
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		1,402,290.74	853,635.64	2,255,926.38	
F. FUND BALANCE / NET POSITION					
1. Beginning Fund Balance/Net Position					
a. As of July 1	9791	2,079,470.75	664,986.80	2,744,457.55	
b. Adjustments/Restatements	9793, 9795	126,953.00	(47,567.00)	79,386.00	
c. Adjusted Beginning Fund Balance /Net Position		2,206,423.75	617,419.80	2,823,843.55	
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		3,608,714.49	1,471,055.44	5,079,769.93	
Components of Ending Fund Balance (Modified Accrual Basis only)					
a. Nonspendable					
1. Revolving Cash (equals Object 9130)	9711			0.00	
2. Stores (equals Object 9320)	9712			0.00	
3. Prepaid Expenditures (equals Object 9330)	9713			0.00	
4. All Others	9719			0.00	
b. Restricted	9740			0.00	
c. Committed					
1. Stabilization Arrangements	9750			0.00	
2. Other Commitments	9760			0.00	
d. Assigned	9780			0.00	
e. Unassigned/Unappropriated					
1. Reserve for Economic Uncertainties	9789			0.00	
2. Unassigned/Unappropriated Amount	9790M			0.00	
3. Components of Ending Net Position (Accrual Basis only)					
a. Net Investment in Capital Assets	9796	0.00	0.00	0.00	
b. Restricted Net Position	9797		1,471,055.44	1,471,055.44	
c. Unrestricted Net Position	9790A	3,608,714.49	0.00	3,608,714.49	
	Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS					
1. Cash					
In County Treasury	9110	3,607,817.90	1,068,377.44	4,676,195.34	
Fair Value Adjustment to Cash in County Treasury	9111	0.00		0.00	
In Banks	9120			0.00	
In Revolving Fund	9130			0.00	
With Fiscal Agent/Trustee	9135		51,857.00	51,857.00	
Collections Awaiting Deposit	9140			0.00	
2. Investments	9150			0.00	
3. Accounts Receivable	9200	322,982.63	662,719.30	985,701.93	
4. Due from Grantor Governments	9290			0.00	
5. Stores	9320			0.00	
6. Prepaid Expenditures (Expenses)	9330	100,743.04		100,743.04	
7. Other Current Assets	9340			0.00	
8. Lease Receivable	9380			0.00	
9. Capital Assets (accrual basis only)	9400-9489			0.00	
10. TOTAL ASSETS		4,031,543.57	1,782,953.74	5,814,497.31	
H. DEFERRED OUTFLOWS OF RESOURCES					
1. Deferred Outflows of Resources	9490			0.00	
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00	
I. LIABILITIES					
1. Accounts Payable	9500	360,334.53	39,591.85	399,926.38	
2. Due to Grantor Governments	9590			0.00	
3. Current Loans	9640	62,494.00		62,494.00	
4. Unearned Revenue	9650		272,307.00	272,307.00	

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5. Long-Term Liabilities (accrual basis only)	9660-9669			0.00
6. TOTAL LIABILITIES		422,828.53	311,898.85	734,727.38
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690			0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2) (must agree with Line F2)		3,608,715.04	1,471,054.89	5,079,769.93

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a. _____	\$ _____		0.00
b. _____			0.00
c. _____			0.00
d. _____			0.00
e. _____			0.00
f. _____			0.00
g. _____			0.00
h. _____			0.00
i. _____			0.00
j. _____			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries 1000-1999	_____
b. Noncertificated Salaries 2000-2999	_____
c. Employee Benefits 3000-3999 except 3801-3802	_____
d. Books and Supplies 4000-4999	_____
e. Services and Other Operating Expenditures 5000-5999	_____
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Date of Presidential Disaster Declaration	Brief Description i.e., COVID-19 (If no amounts, indicate "None")	Amount
a. _____	_____	_____
b. _____	_____	_____
c. _____	_____	_____
d. _____	_____	_____
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)		0.00

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with 2021-22 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2024-25.

a. Total Expenditures (B8)	12,651,674.99
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	601,004.00
c. Subtotal of State & Local Expenditures [a minus b]	12,050,670.99
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910]	2,268.00
f. Less Supplemental Expenditures made as the result of a Presidentially Declared Disaster	0.00

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TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE

\$ 12,048,402.99

[c minus d minus e minus f]

Excel Academy Charter
 Helendale Elementary
 San Bernardino County

2022-23 Unaudited Actuals
 Charter School Alternative Form
 Certification

36 67736 0139576
 Form ALT
 D8A147NW11(2022-23)

CHARTER SCHOOL UNAUDITED ACTUALS
 FINANCIAL REPORT -- ALTERNATIVE FORM

July 1, 2022 to June 30, 2023

CHARTER SCHOOL CERTIFICATION

Charter School Name: Excel Academy Charter
CDS #: 36-67736-0139576
Charter Approving Entity: Helendale Elementary
County: San Bernardino
Charter #: 2073

NOTE: An Alternative Form submitted to the California Department of Education will not be considered a valid submission if the following information is missing:

For information regarding this report, please contact:

<u>For County Fiscal Contact:</u>	<u>For Approving Entity:</u>	<u>For Charter School:</u>
Annette Baker	Kelly Henderson	Joe Sorrera
Name	Name	Name
Business Services Advisor	Assistant Superintendent	Director of Business Services
Title	Title	Title
909-378-5541	760-952-1180	949-387-7822
Telephone	Telephone	Telephone
annette_baker@sbcscs.k12.ca.us	khenderson@helendale.com	jsorrera@excelacademy.education
Email address	Email address	Email address

To the entity that approved the charter school:

X 2022-23 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been approved, and is hereby filed by the charter school pursuant to Education Code Section 42100(b).

Signed: _____ Date: _____
 Charter School Official
 (Original signature required)
 Printed Name: Heidi Gasca Title: Executive Director/CEO

To the County Superintendent of Schools:

X 2022-23 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report is hereby filed with the County Superintendent pursuant to Education Code Section 42100(a).

Signed: _____ Date: _____
 Authorized Representative of
 Charter Approving Entity
 (Original signature required)
 Printed Name: Kelly Henderson Title: Assistant Superintendent

To the Superintendent of Public Instruction:

2022-23 CHARTER SCHOOL UNAUDITED ACTUALS FINANCIAL REPORT -- ALTERNATIVE FORM: This report has been verified for mathematical accuracy by the County Superintendent of Schools pursuant to Education Code Section 42100(a).

Signed: _____ Date: _____
 County Superintendent/Designee
 (Original signature required)

CHARTER SCHOOL UNAUDITED ACTUALS
 FINANCIAL REPORT -- ALTERNATIVE FORM
July 1, 2022 to June 30, 2023

Charter School Name: Excel Academy Charter
CDS #: 36-67736-0139576
Charter Approving Entity: Helendale Elementary
County: San Bernardino
Charter #: 2073

This charter school uses the following basis of accounting:
 (Please enter an "X" in the applicable box below; check only one box)

- Accrual Basis (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 6910, 7438, 9400-9489, 9660-9669, 9796, and 9797)**
- Modified Accrual Basis (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 6600, 7438, 7439, and 9711-9789)**

Description	Object Code	Unrestricted	Restricted	Total
A. REVENUES				
1. LCFF Sources				
State Aid - Current Year	8011	5,798,764.00		5,798,764.00
Education Protection Account State Aid - Current Year	8012	109,182.00		109,182.00
State Aid - Prior Years	8019	(133,591.00)		(133,591.00)
Transfers to Charter Schools in Lieu of Property Taxes	8096	105,623.00		105,623.00
Other LCFF Transfers	8091, 8097			0.00
Total, LCFF Sources		5,879,978.00	0.00	5,879,978.00
2. Federal Revenues (see NOTE in Section L)				
No Child Left Behind/Every Student Succeeds Act	8290		78,065.74	78,065.74
Special Education - Federal	8181, 8182		111,840.00	111,840.00
Child Nutrition - Federal	8220		0.00	0.00
Donated Food Commodities	8221		0.00	0.00
Other Federal Revenues	8110, 8260-8299		77,333.00	77,333.00
Total, Federal Revenues		0.00	267,238.74	267,238.74
3. Other State Revenues				
Special Education - State	StateRev SE		452,358.67	452,358.67
All Other State Revenues	StateRev AO	109,105.29	864,057.61	973,162.90
Total, Other State Revenues		109,105.29	1,316,416.28	1,425,521.57
4. Other Local Revenues				
All Other Local Revenues	LocalRev AO	822.90	2,415.00	3,237.90
Total, Local Revenues		822.90	2,415.00	3,237.90
5. TOTAL REVENUES				
		5,989,906.19	1,586,070.02	7,575,976.21
B. EXPENDITURES (see NOTE in Section L)				
1. Certificated Salaries				
Certificated Teachers' Salaries	1100	1,662,437.15	355,878.34	2,018,315.49
Certificated Pupil Support Salaries	1200	72,082.08	147,652.60	219,734.68
Certificated Supervisors' and Administrators' Salaries	1300	323,417.72	159,363.84	482,781.56
Other Certificated Salaries	1900	40,543.35	0.00	40,543.35
Total, Certificated Salaries		2,098,480.30	662,894.78	2,761,375.08
2. Noncertificated Salaries				
Noncertificated Instructional Salaries	2100	8,682.24	49,588.05	58,270.29
Noncertificated Support Salaries	2200	0.00	0.00	0.00
Noncertificated Supervisors' and Administrators' Salaries	2300	85,584.04	0.00	85,584.04
Clerical, Technical and Office Salaries	2400	287,617.00	23,353.05	310,970.05
Other Noncertificated Salaries	2900	0.00	0.00	0.00
Total, Noncertificated Salaries		381,883.28	72,941.10	454,824.38
3. Employee Benefits				
STRS	3101-3102	243,884.89	258,923.14	502,808.03
PERS	3201-3202	0.00	0.00	0.00
OASDI / Medicare / Alternative	3301-3302	61,119.58	14,342.89	75,462.47

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Health and Welfare Benefits	3401-3402	276,244.07	52,505.91	328,749.98
Unemployment Insurance	3501-3502	4,896.63	2,395.95	7,292.58
Workers' Compensation Insurance	3601-3602	13,351.74	4,302.04	17,653.78
OPEB, Allocated	3701-3702	0.00	0.00	0.00
OPEB, Active Employees	3751-3752	0.00	0.00	0.00
Other Employee Benefits	3901-3902	27,887.95	6,628.11	34,516.06
Total, Employee Benefits		627,384.86	339,098.04	966,482.90
4. Books and Supplies				
Approved Textbooks and Core Curricula Materials	4100	321,656.71	52,767.04	374,423.75
Books and Other Reference Materials	4200	0.00	0.00	0.00
Materials and Supplies	4300	267,364.48	32,278.92	299,643.40
Noncapitalized Equipment	4400	8,663.74	715.98	9,379.72
Food	4700	0.00	0.00	0.00
Total, Books and Supplies		597,684.93	85,761.94	683,446.87
5. Services and Other Operating Expenditures				
Subagreements for Services	5100	4,653.00	96,817.15	101,470.15
Travel and Conferences	5200	17,378.19	18,374.88	35,753.07
Dues and Memberships	5300	20,196.60	6,550.15	26,746.75
Insurance	5400	21,876.03	0.00	21,876.03
Operations and Housekeeping Services	5500	0.00	0.00	0.00
Rentals, Leases, Repairs, and Noncap. Improvements	5600	30,694.68	0.00	30,694.68
Transfers of Direct Costs	5700-5799	0.00	0.00	0.00
Professional/Consulting Services and Operating Expend.	5800	1,062,953.49	38,440.20	1,101,393.69
Communications	5900	30,814.55	24.27	30,838.82
Total, Services and Other Operating Expenditures		1,188,566.54	160,206.65	1,348,773.19
6. Capital Outlay				
(Objects 6100-6170, 6200-6500 modified accrual basis only)				
Land and Land Improvements	6100-6170			0.00
Buildings and Improvements of Buildings	6200			0.00
Books and Media for New School Libraries or Major				
Expansion of School Libraries	6300			0.00
Equipment	6400			0.00
Equipment Replacement	6500			0.00
Lease Assets	6600			0.00
Depreciation Expense (accrual basis only)	6900	0.00	0.00	0.00
Amortization Expense - Lease Assets	6910	0.00	0.00	0.00
Total, Capital Outlay		0.00	0.00	0.00
7. Other Outgo				
Tuition to Other Schools	7110-7143	0.00	0.00	0.00
Transfers of Pass-Through Revenues to Other LEAs	7211-7213	0.00	0.00	0.00
Transfers of Apportionments to Other LEAs - Spec. Ed.	7221-7223SE		0.00	0.00
Transfers of Apportionments to Other LEAs - All Other	7221-7223AO	0.00	0.00	0.00
All Other Transfers	7281-7299	0.00	0.00	0.00
Transfers of Indirect Costs	7300-7399	0.00	0.00	0.00
Debt Service:				
Interest	7438	27,881.75	0.00	27,881.75
Principal (for modified accrual basis only)	7439			0.00
Total Debt Service		27,881.75	0.00	27,881.75
Total, Other Outgo		27,881.75	0.00	27,881.75
8. TOTAL EXPENDITURES		4,921,881.66	1,320,902.51	6,242,784.17
C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES BEFORE OTHER FINANCING SOURCES AND USES (A5-B8)		1,068,024.53	265,167.51	1,333,192.04
D. OTHER FINANCING SOURCES / USES				
1. Other Sources	8930-8979	0.00	0.00	0.00

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Less:					
2. Other Uses	7630-7699	0.00	0.00	0.00	
3. Contributions Between Unrestricted and Restricted Accounts (must net to zero)	8980-8999	(302,378.77)	302,378.77	0.00	
4. TOTAL OTHER FINANCING SOURCES / USES		(302,378.77)	302,378.77	0.00	
E. NET INCREASE (DECREASE) IN FUND BALANCE /NET POSITION (C+D4)		765,645.76	567,546.28	1,333,192.04	
F. FUND BALANCE / NET POSITION					
1. Beginning Fund Balance/Net Position					
a. As of July 1	9791	1,735,682.96	419,004.31	2,154,687.27	
b. Adjustments/Restatements	9793, 9795	(151,207.00)	(66,585.00)	(217,792.00)	
c. Adjusted Beginning Fund Balance /Net Position		1,584,475.96	352,419.31	1,936,895.27	
2. Ending Fund Balance /Net Position, June 30 (E+F1c)		2,350,121.72	919,965.59	3,270,087.31	
Components of Ending Fund Balance (Modified Accrual Basis only)					
a. Nonspendable					
1. Revolving Cash (equals Object 9130)	9711			0.00	
2. Stores (equals Object 9320)	9712			0.00	
3. Prepaid Expenditures (equals Object 9330)	9713			0.00	
4. All Others	9719			0.00	
b. Restricted	9740			0.00	
c. Committed					
1. Stabilization Arrangements	9750			0.00	
2. Other Commitments	9760			0.00	
d. Assigned	9780			0.00	
e. Unassigned/Unappropriated					
1. Reserve for Economic Uncertainties	9789			0.00	
2. Unassigned/Unappropriated Amount	9790M			0.00	
3. Components of Ending Net Position (Accrual Basis only)					
a. Net Investment in Capital Assets	9796	0.00	0.00	0.00	
b. Restricted Net Position	9797		919,965.59	919,965.59	
c. Unrestricted Net Position	9790A	2,350,121.72	0.00	2,350,121.72	
	Description	Object Code	Unrestricted	Restricted	Total
G. ASSETS					
1. Cash					
In County Treasury	9110	1,968,557.91	43,725.00	2,012,282.91	
Fair Value Adjustment to Cash in County Treasury	9111	0.00	0.00	0.00	
In Banks	9120	154,665.82	721,254.95	875,920.77	
In Revolving Fund	9130	0.00	0.00	0.00	
With Fiscal Agent/Trustee	9135	0.00	23,122.00	23,122.00	
Collections Awaiting Deposit	9140	0.00	0.00	0.00	
2. Investments	9150	0.00	0.00	0.00	
3. Accounts Receivable	9200	665,193.17	315,482.64	980,675.81	
4. Due from Grantor Governments	9290	0.00	0.00	0.00	
5. Stores	9320	0.00	0.00	0.00	
6. Prepaid Expenditures (Expenses)	9330	51,447.40	0.00	51,447.40	
7. Other Current Assets	9340	0.00	0.00	0.00	
8. Lease Receivable	9380	0.00	0.00	0.00	
9. Capital Assets (accrual basis only)	9400-9489	0.00	0.00	0.00	
10. TOTAL ASSETS		2,839,864.30	1,103,584.59	3,943,448.89	
H. DEFERRED OUTFLOWS OF RESOURCES					
1. Deferred Outflows of Resources	9490	0.00	0.00	0.00	
2. TOTAL DEFERRED OUTFLOWS		0.00	0.00	0.00	
I. LIABILITIES					
1. Accounts Payable	9500	489,742.58	10,357.00	500,099.58	
2. Due to Grantor Governments	9590	0.00	0.00	0.00	
3. Current Loans	9640	0.00	0.00	0.00	
4. Unearned Revenue	9650	0.00	173,262.00	173,262.00	

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5. Long-Term Liabilities (accrual basis only)	9660-9669	0.00	0.00	0.00
6. TOTAL LIABILITIES		489,742.58	183,619.00	673,361.58
J. DEFERRED INFLOWS OF RESOURCES				
1. Deferred Inflows of Resources	9690	0.00	0.00	0.00
2. TOTAL DEFERRED INFLOWS		0.00	0.00	0.00
K. FUND BALANCE /NET POSITION				
Ending Fund Balance /Net Position, June 30 (G10 + H2) - (I6 + J2)				
(must agree with Line F2)		2,350,121.72	919,965.59	3,270,087.31

L. FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT

NOTE: IF YOUR CHARTER SCHOOL RECEIVED FEDERAL FUNDING, AS REPORTED IN SECTION A2, THE FOLLOWING ADDITIONAL INFORMATION MUST BE PROVIDED IN ORDER FOR THE CDE TO CALCULATE COMPLIANCE WITH THE FEDERAL EVERY STUDENT SUCCEEDS ACT (ESSA) MAINTENANCE OF EFFORT REQUIREMENT:

1. Federal Revenue Used for Capital Outlay and Debt Service

Included in the Capital Outlay and Debt Service expenditures reported in sections B6 and B7 are the following amounts paid out of federal funds:

Federal Program Name (If no amounts, indicate "NONE")	Capital Outlay	Debt Service	Total
a. NONE	\$ 0.00	0.00	0.00
b. _____			0.00
c. _____			0.00
d. _____			0.00
e. _____			0.00
f. _____			0.00
g. _____			0.00
h. _____			0.00
i. _____			0.00
j. _____			0.00
TOTAL FEDERAL REVENUES USED FOR CAPITAL OUTLAY AND DEBT SERVICE	0.00	0.00	0.00

2. Community Services Expenditures

Provide the amount of State and Local funds reported in Section B that were expended for Community Services Activities:

Objects of Expenditures	Amount (Enter "0.00" if none)
a. Certificated Salaries 1000-1999	0.00
b. Noncertificated Salaries 2000-2999	0.00
c. Employee Benefits 3000-3999 except 3801-3802	0.00
d. Books and Supplies 4000-4999	0.00
e. Services and Other Operating Expenditures 5000-5999	0.00
TOTAL COMMUNITY SERVICES EXPENDITURES	0.00

3. Supplemental State and Local Expenditures resulting from a Presidentially Declared Disaster

Date of Presidential Disaster Declaration	Brief Description i.e., COVID-19 (If no amounts, indicate "None")	Amount
a. NONE		0.00
b. _____		
c. _____		
d. _____		
TOTAL SUPPLEMENTAL EXPENDITURES (Should not be negative)		0.00

4. State and Local Expenditures to be Used for ESSA Annual Maintenance of Effort Calculation:

Results of this calculation will be used for comparison with 2021-22 expenditures. Failure to maintain the required 90 percent expenditure level on either an aggregate or per capita expenditure basis may result in reduction to allocations for covered programs in 2024-25.

a. Total Expenditures (B8)	6,242,784.17
b. Less Federal Expenditures (Total A2) [Revenues are used as proxy for expenditures because most federal revenues are normally recognized in the period that qualifying expenditures are incurred]	267,238.74
c. Subtotal of State & Local Expenditures [a minus b]	5,975,545.43
d. Less Community Services [L2 Total]	0.00
e. Less Capital Outlay & Debt Service [Total B6 plus objects 7438 and 7439, less L1 Total, less objects 6600 and 6910]	27,881.75
f. Less Supplemental Expenditures made as the result of a Presidentially	0.00

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Declared Disaster

TOTAL STATE & LOCAL EXPENDITURES SUBJECT TO MOE

[c minus d minus e minus f]

\$	5,947,663.68
----	--------------

Coversheet

Approval of 2023-24 Consolidated Application and Reporting System (CARS)

Section: XIII. Business/Financial Services
Item: B. Approval of 2023-24 Consolidated Application and Reporting System (CARS)
Purpose: Vote
Submitted by:
Related Material: 2023–24 Certification of Assurances for Helendale.pdf
2023–24 Certification of Assurances for Warner.pdf

BACKGROUND:

Excel Academy Charter School (EACS) submits the Consolidated Application to the California Department of Education (CDE) under the Consolidated Reporting System (CARS). There are two data collections for Consolidated Application each year (winter and spring). The Consolidated Application Spring Data collection is from May 15 through June 30. Data collected in this report includes EACS 2023/24 Application for Funding for Title I, Title II, Title III, and Title IV, Certification of Assurances, Protected Prayer Certification, and LCAP Federal Addendum Certification.

RECOMMENDATION:

It is recommended the Board of Directors approve the 2023/24 Consolidated Application and Reporting System (CARS) for Excel Academy Charter School, Helendale (2073), Warner (2053).

Excel Academy Charter (37 75416 0139386)

Status: Certified
 Saved by: Joe Sorrera
 Date: 8/31/2023 9:40 AM

2023–24 Certification of Assurances

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at <https://www.cde.ca.gov/fg/aa/co/ca21assurancetoc.asp>.

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Consolidated Application Certification Statement

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to participate in the monitoring process regarding the use of these funds according to the standards and criteria set forth by the California Department of Education Federal Program Monitoring (FPM) Office. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form are on file.

Authorized Representative's Full Name	Joe Sorrera
Authorized Representative's Signature	
Authorized Representative's Title	Director of Business Services
Authorized Representative's Signature Date	08/31/2023

*****Warning*****

The data in this report may be protected by the Family Educational Rights and Privacy Act (FERPA) and other applicable data privacy laws. Unauthorized access or sharing of this data may constitute a violation of both state and federal law.

Excel Academy Charter (37 75416 0139386)

Status: Certified
 Saved by: Joe Sorrera
 Date: 8/31/2023 9:41 AM

2023–24 Protected Prayer Certification

Every Student Succeeds Act (ESSA) Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

CDE Program Contact:

Miguel Cordova, Title I Policy, Program, and Support Office, MCordova@cde.ca.gov, 916-319-0381

Protected Prayer Certification Statement

The local educational agency (LEA) hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	Joe Sorrera
Authorized Representative's Title	Director of Business Services
Authorized Representative's Signature Date	08/31/2023
Comment	
If the LEA is not able to certify at this time, then an explanation must be provided in the comment field. (Maximum 500 characters)	

*****Warning*****

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2023–24 LCAP Federal Addendum Certification

CDE Program Contact:

Local Agency Systems Support Office, LCAPAddendum@cde.ca.gov, 916-323-5233

Initial Application

To receive initial funding under the Every Student Succeeds Act (ESSA), a local educational agency (LEA) must have a plan approved by the State Educational Agency on file with the State. Within California, LEAs that apply for ESSA funds for the first time are required to complete the Local Control and Accountability Plan (LCAP), the LCAP Federal Addendum Template (Addendum), and the Consolidated Application (ConApp). The LCAP, in conjunction with the Addendum and the ConApp, serve to meet the requirements of the ESSA LEA Plan.

In order to initially apply for funds, the LEA must certify that the current LCAP has been approved by the local governing board or governing body of the LEA. As part of this certification, the LEA agrees to submit the LCAP Federal Addendum, that has been approved by the local governing board or governing body of the LEA, to the California Department of Education (CDE) and acknowledges that the LEA agrees to work with the CDE to ensure that the Addendum addresses all required provisions of the ESSA programs for which they are applying for federal education funds.

Returning Application

If the LEA certified a prior year LCAP Federal Addendum Certification data collection form in the Consolidated Application and Reporting System, then the LEA may use in this form the same original approval or adoption date used in the prior year form.

County Office of Education (COE) or District For a COE, enter the original approval date as the day the CDE approved the current LCAP. For a district, enter the original approval date as the day the COE approved the current LCAP	
Direct Funded Charter Enter the adoption date of the current LCAP	06/22/2023
Authorized Representative's Full Name	Joe Sorrera
Authorized Representative's Title	Director of Business Services

*****Warning*****

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2023–24 Application for Funding**CDE Program Contact:**Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297**Local Governing Board Approval**

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes
---	-----

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	Yes
---	-----

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

Title I, Part A (Basic Grant) ESSA Sec. 1111 et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	Yes
Title III Immigrant ESEA Sec. 3102 SACS 4201	No
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

*****Warning*****

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Excel Academy Charter (37 75416 0139386)

Status: Certified
Saved by: Joe Sorrera
Date: 8/31/2023 9:41 AM**2023–24 Title III English Learner Student Program Subgrant Budget**

The purpose of this data collection form is to provide a proposed budget for English learner (EL) Student Program Subgrant funds only per the Title III English Learner Students Program requirements (ESSA, Sections 3114, 3115, & 3116).

CDE Program Contact:

Annie Abreu Park, Language Policy and Leadership Office, AAbreuPark@cde.ca.gov, 916-319-9620
Geoffrey Ndirangu, Language Policy and Leadership Office, GNdirang@cde.ca.gov, 916-323-5831

Estimated Allocation Calculation

Estimated English learner per student allocation	\$125.15
Estimated English learner student count	23
Estimated English learner student program allocation	\$2,878

Note: \$10,000 minimum program eligibility criteria

If the local educational agency's estimated English learner student program allocation is less than \$10,000, then it does not meet the minimum program eligibility criteria for direct funding status and requires further action. To receive instructions regarding the consortium application process, please go to the California Department of Education Title III EL Consortium Details web page at <https://www.cde.ca.gov/sp/el/t3/elconsortium.asp>.

Budget

Professional development activities	\$2,878
Program and other authorized activities	\$0
English Proficiency and Academic Achievement	\$0
Parent, family, and community engagement	\$0
Direct administrative costs (Amount cannot exceed 2% of the estimated English learner student program allocation)	\$0
Indirect costs (LEA can apply its approved indirect rate to the portion of the subgrant that is not reserved for direct administrative costs)	\$0
Total budget	\$2,878

*****Warning*****

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Excel Academy Charter (37 75416 0139386)

Status: Certified
 Saved by: Joe Sorrera
 Date: 8/31/2023 9:41 AM

2023–24 Substitute System for Time Accounting

This certification may be used by auditors and by California Department of Education oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the local educational agency (LEA) submits and certifies this data collection.

CDE Program Contact:

Hilary Thomson, Fiscal Oversight and Support Office, HThomson@cde.ca.gov, 916-323-0765

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate.

Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the web at <https://www.cde.ca.gov/fg/ac/sa/>.

2022–23 Request for authorization	No
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	

*****Warning*****

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Excel Academy Charter (36 67736 0139576)

Status: Certified
Saved by: Joe Sorrera
Date: 8/31/2023 9:39 AM**2023–24 Certification of Assurances**

Submission of Certification of Assurances is required every fiscal year. A complete list of legal and program assurances for the fiscal year can be found at <https://www.cde.ca.gov/fg/aa/co/ca21assurancetoc.asp>.

CDE Program Contact:

Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297

Consolidated Application Certification Statement

I hereby certify that all of the applicable state and federal rules and regulations will be observed by this applicant; that to the best of my knowledge the information contained in this application is correct and complete; and I agree to participate in the monitoring process regarding the use of these funds according to the standards and criteria set forth by the California Department of Education Federal Program Monitoring (FPM) Office. Legal assurances for all programs are accepted as the basic legal condition for the operation of selected projects and programs and copies of assurances are retained on site. I certify that we accept all assurances except for those for which a waiver has been obtained or requested. A copy of all waivers or requests is on file. I certify that actual ink signatures for this form are on file.

Authorized Representative's Full Name	Joe Sorrera
Authorized Representative's Signature	
Authorized Representative's Title	Director of Business Services
Authorized Representative's Signature Date	08/31/2023

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Excel Academy Charter (36 67736 0139576)

Status: Certified
 Saved by: Joe Sorrera
 Date: 8/31/2023 9:42 AM

2023–24 Protected Prayer Certification

Every Student Succeeds Act (ESSA) Section 8524 specifies federal requirements regarding constitutionally protected prayer in public elementary and secondary schools. This form meets the annual requirement and provides written certification.

CDE Program Contact:

Miguel Cordova, Title I Policy, Program, and Support Office, MCordova@cde.ca.gov, 916-319-0381

Protected Prayer Certification Statement

The local educational agency (LEA) hereby assures and certifies to the California State Board of Education that the LEA has no policy that prevents, or otherwise denies participation in, constitutionally protected prayer in public schools as set forth in the "Guidance on Constitutionally Protected Prayer in Public Elementary and Secondary Schools."

The LEA hereby assures that this page has been printed and contains an ink signature. The ink signature copy shall be made available to the California Department of Education upon request or as part of an audit, a compliance review, or a complaint investigation.

The authorized representative agrees to the above statement	Yes
Authorized Representative's Full Name	Joe Sorrera
Authorized Representative's Title	Director of Business Services
Authorized Representative's Signature Date	08/31/2023
Comment	
If the LEA is not able to certify at this time, then an explanation must be provided in the comment field. (Maximum 500 characters)	

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2023–24 LCAP Federal Addendum Certification

CDE Program Contact:

Local Agency Systems Support Office, LCAPAddendum@cde.ca.gov, 916-323-5233

Initial Application

To receive initial funding under the Every Student Succeeds Act (ESSA), a local educational agency (LEA) must have a plan approved by the State Educational Agency on file with the State. Within California, LEAs that apply for ESSA funds for the first time are required to complete the Local Control and Accountability Plan (LCAP), the LCAP Federal Addendum Template (Addendum), and the Consolidated Application (ConApp). The LCAP, in conjunction with the Addendum and the ConApp, serve to meet the requirements of the ESSA LEA Plan.

In order to initially apply for funds, the LEA must certify that the current LCAP has been approved by the local governing board or governing body of the LEA. As part of this certification, the LEA agrees to submit the LCAP Federal Addendum, that has been approved by the local governing board or governing body of the LEA, to the California Department of Education (CDE) and acknowledges that the LEA agrees to work with the CDE to ensure that the Addendum addresses all required provisions of the ESSA programs for which they are applying for federal education funds.

Returning Application

If the LEA certified a prior year LCAP Federal Addendum Certification data collection form in the Consolidated Application and Reporting System, then the LEA may use in this form the same original approval or adoption date used in the prior year form.

County Office of Education (COE) or District For a COE, enter the original approval date as the day the CDE approved the current LCAP. For a district, enter the original approval date as the day the COE approved the current LCAP	
Direct Funded Charter Enter the adoption date of the current LCAP	06/22/2023
Authorized Representative's Full Name	Joe Sorrera
Authorized Representative's Title	Director of Business Services

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2023–24 Application for Funding**CDE Program Contact:**Consolidated Application Support Desk, Education Data Office, ConAppSupport@cde.ca.gov, 916-319-0297**Local Governing Board Approval**

The local educational agency (LEA) is required to review and receive approval of their Application for Funding selections with their local governing board.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year	Yes
---	-----

District English Learner Advisory Committee Review

Per Title 5 of the California Code of Regulations Section 11308, if your LEA has more than 50 English learners, then the LEA must establish a District English Learner Advisory Committee (DELAC) which shall review and advise on the development of the application for funding programs that serve English learners.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year	No
---	----

Application for Categorical Programs

To receive specific categorical funds for a school year, the LEA must apply for the funds by selecting Yes below. Only the categorical funds that the LEA is eligible to receive are displayed.

Title I, Part A (Basic Grant) ESSA Sec. 1111 et seq. SACS 3010	Yes
Title II, Part A (Supporting Effective Instruction) ESEA Sec. 2104 SACS 4035	Yes
Title III English Learner ESEA Sec. 3102 SACS 4203	Yes
Title III Immigrant ESEA Sec. 3102 SACS 4201	No
Title IV, Part A (Student and School Support) ESSA Sec. 4101 SACS 4127	Yes

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2023–24 Title III English Learner Student Program Subgrant Budget

The purpose of this data collection form is to provide a proposed budget for English learner (EL) Student Program Subgrant funds only per the Title III English Learner Students Program requirements (ESSA, Sections 3114, 3115, & 3116).

CDE Program Contact:

Annie Abreu Park, Language Policy and Leadership Office, AAbreuPark@cde.ca.gov, 916-319-9620
 Geoffrey Ndirangu, Language Policy and Leadership Office, GNdirang@cde.ca.gov, 916-323-5831

Estimated Allocation Calculation

Estimated English learner per student allocation	\$125.15
Estimated English learner student count	17
Estimated English learner student program allocation	\$2,128

Note: \$10,000 minimum program eligibility criteria

If the local educational agency's estimated English learner student program allocation is less than \$10,000, then it does not meet the minimum program eligibility criteria for direct funding status and requires further action. To receive instructions regarding the consortium application process, please go to the California Department of Education Title III EL Consortium Details web page at <https://www.cde.ca.gov/sp/el/t3/elconsortium.asp>.

Budget

Professional development activities	\$2,128
Program and other authorized activities	\$0
English Proficiency and Academic Achievement	\$0
Parent, family, and community engagement	\$0
Direct administrative costs (Amount cannot exceed 2% of the estimated English learner student program allocation)	\$0
Indirect costs (LEA can apply its approved indirect rate to the portion of the subgrant that is not reserved for direct administrative costs)	\$0
Total budget	\$2,128

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Excel Academy Charter (36 67736 0139576)

Status: Certified
 Saved by: Joe Sorrera
 Date: 8/31/2023 9:42 AM

2023–24 Substitute System for Time Accounting

This certification may be used by auditors and by California Department of Education oversight personnel when conducting audits and sub-recipient monitoring of the substitute time-and-effort system. Approval is automatically granted when the local educational agency (LEA) submits and certifies this data collection.

CDE Program Contact:

Hilary Thomson, Fiscal Oversight and Support Office, HThomson@cde.ca.gov, 916-323-0765

The LEA certifies that only eligible employees will participate in the substitute system and that the system used to document employee work schedules includes sufficient controls to ensure that the schedules are accurate.

Detailed information on documenting salaries and wages, including both substitute systems of time accounting, are described in Procedure 905 of the California School Accounting Manual posted on the web at <https://www.cde.ca.gov/fg/ac/sa/>.

2022–23 Request for authorization	No
LEA certifies that the following is a full disclosure of any known deficiencies with the substitute system or known challenges with implementing the system (Maximum 500 characters)	

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Coversheet

Approval of 2023-2024 Excel Academy Board of Directors and Executive Director/CEO Goals

Section: XIV. Personnel Services
Item: A. Approval of 2023-2024 Excel Academy Board of Directors and
Executive Director/CEO Goals
Purpose: Vote
Submitted by:
Related Material: Executive_Director_CEO_Goals___Progress_-_23_24.pdf



EXECUTIVE DIRECTOR/CEO

GOALS & PROGRESS

2023-2024

03 PROCESS & TIMELINE

04 CPSEL STANDARDS

5-8 CEO & Board GOALS

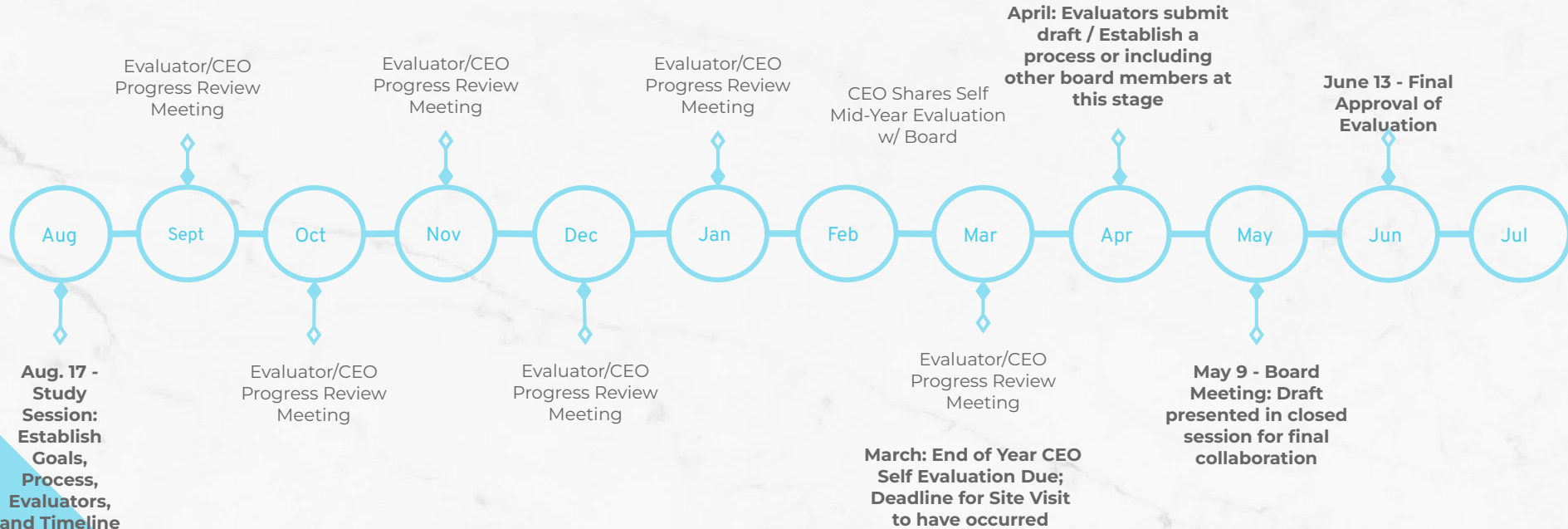
09 EVALUATION TEMPLATE

10 EVALUATION SELECTION & COMPENSATION

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PROPOSED PROCESS & EVALUATION TIMELINE



CPSEL STANDARDS

STANDARD 1

Development and
Implementation of a
Shared Vision

STANDARD 2

Instructional
Leadership

STANDARD 3

Management and
Learning
Environment

STANDARD 4

Family and
Community
Engagement

STANDARD 5

Ethics and Integrity

STANDARD 6

External Context and
Policy

GOAL #1

Continuing my professional development by participating in a two year Clear Administrative Services Credential program via Los Angeles County Office of Education which will be begin in September of 2023.



CPSEL Standard 2
CPSEL Standard 5

GOAL #2

Demonstrate and empower educational partners through education and engagement in data analysis, parent education, community and board governance. Leading the staff, parents and the board in a shared vision driven by data to support the whole student; academically, socially and emotionally.



CPSEL Standard 1
CPSEL Standard 4

GOAL #3

Align the Excel Academy Charter Schools mission and vision in three different aspects by:

- A. Maintaining and reaching new benchmarks in academic achievement by identifying effective CORE curriculum choices, intervention and expanding teacher led classes.
- B. Building and fostering strong relationships with our county authorizers and professional organizations that support charter schools.
- C. Maintaining strong fiscal health while managing reserves considering multi year growth and legislative impacts.



CPSEL Standard 2
CPSEL Standard 3
CPSEL Standard 6

BOARD GOALS

From 23/24 Board Eval:

- Proficiency in Technology
- Onboarding of new Board Members
- CEO Succession Plan

2023/24 Excel Academy Charter Schools Executive Director Evaluation Template

 [Click Here](#) 

EVALUATION SELECTION



**Two-Person
Committee**



**12 month
stipend**

\$450/month

Coversheet

Approve 2023-24 Executive Director/CEO Evaluation Process, Timeline, Evaluators, Evaluator Compensation, and Evaluation Template

Section: XIV. Personnel Services

Item: B. Approve 2023-24 Executive Director/CEO Evaluation Process, Timeline, Evaluators, Evaluator Compensation, and Evaluation Template

Purpose: Vote

Submitted by:

Related Material:

2023_24_Excel_Academy_Charter_Schools_Executive_Director_Self_Evaluation__Reflection_and_Evidence_.pdf

Executive_Director_CEO_Goals___Progress_-_23_24.pdf



Executive Director Performance Evaluation

CALIFORNIA PROFESSIONAL STANDARDS FOR EDUCATIONAL LEADERS AND THE DESCRIPTIONS OF PRACTICE

The Executive Director will be rated on their efficacy in the following CPSEL standards:

Standard 1	Development and Implementation of a Shared Vision
Standard 2	Instructional Leadership
Standard 3	Management and Learning Environment
Standard 4	Family and Community Engagement
Standard 5	Ethics and Integrity
Standard 6	External Context and Policy

Standard 1: Development and Implementation of a Shared Vision

ELEMENT	EVALUATION RATING <small>Not Met (NM), Emerging (E), Proficient (P), Distinguished (D)</small>	REFLECTION/EVIDENCE
Element 1A: Student Centered Vision <i>Leaders shape a collective vision that uses multiple</i>		Parent Summit Online Workshop All Staff PD

<i>measures of data and focuses on equitable access, opportunities, and outcomes for all students.</i>		Assessment Highlights Student Achievement Data
Element 1B: Developing Shared Vision <i>Leaders engage others in a collaborative process to develop a vision of teaching and learning that is shared and supported by all stakeholders</i>		Agenda for weekly school development meeting Board Agenda Monthly Board Updates Monthly Collaboration with Authorizing Districts
Element 1C: Vision Planning and Implementation <i>Leaders guide and monitor decisions, actions, and outcomes using the shared vision and goals.</i>		Agenda for weekly school development meeting 1:1 quarterly meetings with direct reports

Standard 2: Instructional Leadership

ELEMENT	EVALUATION RATING <small>Not Met (NM), Emerging (E), Proficient (P), Distinguished (D)</small>	REFLECTION/EVIDENCE
Element 2A: Professional Learning Culture <i>Leaders promote a culture in which staff engage in individual and collective professional learning that results in their continuous improvement and high performance.</i>		Conferences & Trainings Agenda for all staff PD Leadership Survey Results Google Next '23 Conference Plan LACOE Flyer
Element 2B: Curriculum and Instruction <i>Leaders guide and support the implementation of standards-based curriculum, instruction, and assessments that address student expectations and outcomes.</i>		Curriculum Menus - TK-12 CTE Offerings i-ready Presentation Math Curriculum Analysis Presentation Helendale EACS Dashboard Warner EACS Dashboard
Element 2C: Assessment and Accountability <i>Leaders develop and use assessment and accountability</i>		Evaluation Tracking Virtual ToR

<i>systems to monitor, improve, and extend educator practice, program outcomes, and student learning.</i>		SPED Case Manager Personalized ToR Performance Success plan Performance Improvement Process Performance Improvement Plan
---	--	---

Standard 3: Management and Learning Environment

ELEMENT	EVALUATION RATING <small>Not Met (NM), Emerging (E), Proficient (P), Distinguished (D)</small>	REFLECTION/EVIDENCE
Element 3A: Operations and Facilities <i>Leaders provide and oversee a functional, safe, and clean learning environment.</i>		Office Safety Checklist
Element 3B: Plans and Procedures <i>Leaders establish structures and employ policies and processes that support students to graduate ready for college and career.</i>		ToR Manual Parent/Student Handbook
Element 3C: Climate <i>Leaders facilitate safe, fair, and respectful environments that meet the intellectual, linguistic, cultural, social-emotional, and physical needs of each learner.</i>		HR Handbook Panorama Contract Care Solace Contract BIP Template
Element 3D: Fiscal and Human Resources <i>Leaders align fiscal and human resources and manage policies and contractual agreements that build a productive learning environment.</i>		Unaudited Actuals Presentation First Interim Budget Fiscal Audit Report CLA Audit Contract Second Interim

		Strategic Staffing plan for upcoming 24/25 school year Salary schedules for 24/25
--	--	--

Standard 4: Family and Community Engagement

ELEMENT	EVALUATION RATING <small>Not Met (NM), Emerging (E), Proficient (P), Distinguished (D)</small>	REFLECTION/EVIDENCE
<p>Element 4A: Parent and Family Engagement <i>Leaders meaningfully involve all parents and families, including under-represented communities, in student learning and support programs.</i></p>		ELPAC Flyer ELAC Flyer PAC flyer SSC Flyer Parent Summit Online Workshop Teacher on Special Assignment Gen Ed JD Summer Socials Parent Survey Results Presentation Summer Liaison Communication Log
<p>Element 4B: Community Partnerships <i>Leaders establish community partnerships that promote and support students to meet performance and content expectations and graduate ready for college and career.</i></p>		CCP Application CCP Code of Conduct
<p>Element 4C: Community Resources and Services <i>Leaders leverage and integrate community resources and services to meet the varied needs of all students.</i></p>		CCP List Theater Arts Program

Standard 5: Ethics and Integrity

ELEMENT	EVALUATION RATING	REFLECTION/EVIDENCE
---------	-------------------	---------------------

*Not Met (NM), Emerging (E),
Proficient (P), Distinguished (D)*

<p>Element 5A: Reflective Practice <i>Leaders act upon a personal code of ethics that requires continuous reflection and learning.</i></p>		
<p>Element 5B: Ethical Decision-Making <i>Leaders guide and support personal and collective actions that use relevant evidence and available research to make fair and ethical decisions.</i></p>		<p>Meeting with San Diego County's Representatives for the California Charter School's Member Council APlus+ Advisory Council Member</p>
<p>Element 5C: Ethical Action <i>Leaders recognize and use their professional influence with staff and the community to develop a climate of trust, mutual respect, and honest communication, necessary to consistently make fair and equitable decisions on behalf of all students</i></p>		<p>APlus+ Advisory Council Member Presenter at the CCSA Conference</p>

Standard 6: External Context and Policy

<p>ELEMENT</p>	<p>EVALUATION RATING <i>Not Met (NM), Emerging (E), Proficient (P), Distinguished (D)</i></p>	<p>REFLECTION/EVIDENCE</p>
<p>Element 6A: Understanding and Communicating Policy <i>Leaders actively structure and participate in opportunities that develop greater public understanding of the education policy environment.</i></p>		<p>Board Agenda Preparation Meetings Monthly Board Updates Warner Compliance Calendar Helendale Compliance Calendar EACS Policy Organizer EACS Board Manual</p>
<p>Element 6B: Professional Influence <i>Leaders use their understanding of social, cultural,</i></p>		<p>APlus+ Advisory Council Member CSDC (Charter School Development Center) active member CCSA (California Charter Schools Association) member</p>

<i>economic, legal, and political contexts to shape policies that lead to all students graduating ready for college and career.</i>		ACSA (Assoc. Of CA School Administrators) SSDA Member (Small Schools District Association) SSC (School Services of California) member
		Member of Sonoma County Charter CEO Council APlus+ Advisory Council Member CSDC (Charter School Development Center) active member CCSA (California Charter Schools Association) member SSC (School Services of California) member EACS Board Manual SSDA Conference

2023/24 Executive Director Annual Goals and Progress

GOAL 1 (CPSEL Standard 2 and CPSEL 5)	<i>Continuing my professional development by participating in a two year Clear Administrative Services Credential program via Los Angeles County Office of Education which will be begin in September of 2023.</i>
Baseline Narrative/ Rationale for Goal	Addressing CPSEL Standard 2: Instructional Leadership and CPSEL standard 5 Ethics and Integrity, I look forward to the opportunity to work closely with an instructional coach for job embedded coaching while attending relevant in person and online seminars. In addition, this goal will allow me to further my skills as a leader in the areas of Visionary Leadership, Professional Learning, Instructional Leadership, Management, Learning Environments and Ethics, Facilitating Teacher Growth and Education Policy Systems and Community Leadership.
End of Year Reflection /Evidence	

2023/24 Executive Director Annual Goals and Progress

<p>GOAL 2 (CPSEL Standard 1 and CPSEL 4)</p>	<p><i>Demonstrate and empower educational partners through education and engagement in data analysis, parent education, community and board governance. Leading the staff, parents and the board in a shared vision driven by data to support the whole student; academically, socially and emotionally.</i></p>
<p>Baseline Narrative/ Rationale for Goal</p>	<p>This goal will allow me to further my skills addressing CPSEL Standard 1:Development and Implementation of a Shared Vision and CPSEL Standard 4: Family and Community Engagement. I look forward to prioritizing parent education as well as implementing skills learned in my credential program to ensure equitable resources for all students at EACS. Emphasis will be placed on contribution to the shared vision during meetings with my direct reports and the board.</p>
<p>End of Year Reflection /Evidence</p>	

2022/23 Executive Director Annual Goals and Progress	
GOAL 3 (CPSEL Standard 2, CPSEL Standard 3 and CPSEL Standard 6)	<p><i>Align the Excel Academy Charter Schools mission and vision in three different aspects by:</i></p> <ul style="list-style-type: none"> <i>a) Maintaining and reaching new benchmarks in academic achievement by identifying effective CORE curriculum choices, intervention and expanding teacher led classes.</i> <i>b) Building and fostering strong relationships with our county authorizers and professional organizations that support charter schools</i> <i>c) Maintaining strong fiscal health while managing reserves considering multi year growth and legislative impacts.</i>
Excel Academy Mission Statement	<p>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.</p>
Baseline Narrative/ Rationale for Goal	<p>The vision of Excel Academy Charter School is laid out in the acronym CHOICE.</p> <p>The heart of Excel Academy is all about CHOICE:</p> <p>C: Compassion, Creativity , Collaboration, Challenge, & Confidence</p> <p>H: Helpful, Hands-On , Humility, & Happiness</p> <p>O: Optimism, Options, Opportunities, Ownership, & Others</p> <p>I: Independence, Individualization, Inspiration, & Investigation</p>

	<p>C: Child-focused, Curiosity, Critical Thinking, Consideration, & Community</p> <p>E: Education, Equity, Enjoyment, Exploration & Empowerment</p>
End of Year Reflection /Evidence	

2023/24 End-of-Year Board Evaluation of Executive Director

Board Comments	ENTER NARRATIVE HERE	
Executive Director has received a satisfactory Evaluation	Select one option ▾	
<i>Board evaluators will receive a final copy through DocuSign for signature and date. Final copy will be placed in the Executive Director/CEO's personnel file.</i>		
William Hall, President		
Michael Humphrey, Vice President		
Steve Fraire, Clerk		
Susan Houle, Board Member		
Larry Alvarado, Board Member		

<i>Employee Name & Title</i>	<i>Signature</i>	<i>Date</i>
Heidi Gasca, Executive Director		

Descriptions of Practice		
EMERGING	PROFICIENT	DISTINGUISHED
<p>The administrator communicates that the vision of all students meeting content and performance standards is central to developing and implementing instructional activities and support services. S/he works with staff to commit to a vision focused on student-centered learning and on the well-being of each student. S/he draws attention to existing equity gaps for diverse student populations. The administrator provides information for staff to learn about the range of academic, linguistic, cultural, social-emotional, behavioral, and physical development needs of the site's students. S/he builds staff capacity for implementing strategic initiatives that both build on students' assets and addresses their needs as a means to attain equity by closing opportunity and achievement gaps.</p>	<p>The leader and staff consistently work toward eliminating disparities among student groups. Working with staff, students, and others, the leader shapes a collective vision of equitable access and opportunity in support of all students' learning and well-being. S/he facilitates a review of varied sources of information about the academic, linguistic, cultural, social-emotional, behavioral, and physical development of each learning to gauge the learner's progress in meeting content and performance outcomes. The leader solicits input about ways to institutionalize equitable access and opportunities for all students to meet expected outcomes. S/he empowers staff to use their experience and expertise to cultivate multiple learning and support opportunities that align with students' diverse assets and needs.</p>	<p>The leader manifests the vision of all students graduating ready for college and career. S/he does so by proactively engaging staff, students, and the broader community in evidence-rich conversations about equitable opportunities and outcomes for all students' learning and well-being. S/he makes certain that these opportunities are available to, and support, students with academic, linguistic, cultural, social-emotional, behavioral, and physical development needs. In collaboration with stakeholders, s/he creatively designs and implements multiple learning opportunities with the goal of eliminating disparities in opportunity and achievement among student groups. The leader sustains effective systems for students with differing abilities, seeing to it that their needs are met with a sense of urgency and high expectations.</p>

End of Year Board Evaluation of Executive Director/CEO

(Board evaluators would insert their narrative here)

Final evaluation to be linked here.

(Board evaluators would select yes or no)

Executive Director/CEO has received a satisfactory evaluation: Yes / No

(Board evaluators will receive a final copy through DocuSign for signature and placement in Executive Director/CEO's personnel file)



EXECUTIVE DIRECTOR/CEO

GOALS & PROGRESS

2023-2024

03 PROCESS & TIMELINE

04 CPSEL STANDARDS

5-8 CEO & Board GOALS

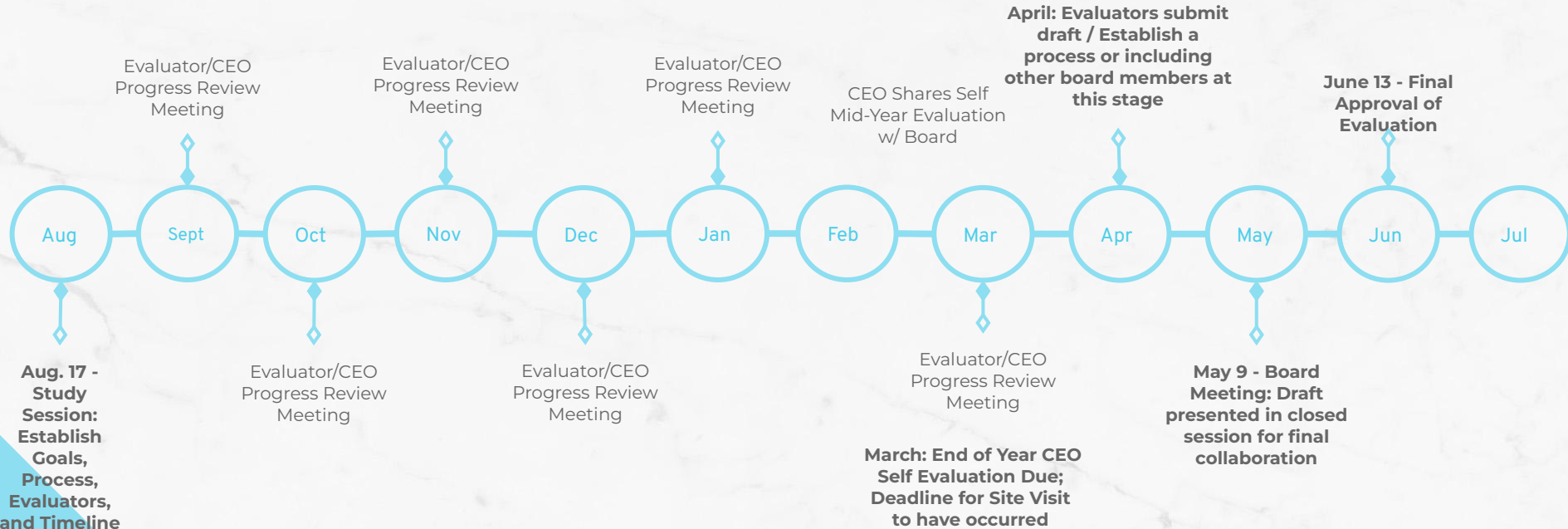
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CPSEL Standard 2
CPSEL Standard 5

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CPSEL Standard 4

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CPSEL Standard 2
CPSEL Standard 3
CPSEL Standard 6

BOARD GOALS

From 23/24 Board Eval:

- Proficiency in Technology
- Onboarding of new Board Members
- CEO Succession Plan

2023/24 Excel Academy Charter Schools Executive Director Evaluation Template

 [Click Here](#) 

EVALUATION SELECTION



**Two-Person
Committee**



**12 month
stipend**

\$450/month