



Excel Academy (CA)

Regular Meeting of the Board of Directors

Published on May 3, 2024 at 3:23 PM PDT

Date and Time

Thursday May 9, 2024 at 12:00 PM 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 US

Meeting ID: 865 4142 3299

URL: <https://us06web.zoom.us/j/86541423299>

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

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

REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY

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REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY

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

Agenda

	Purpose	Presenter	Time
I. Opening Items			12:00 PM
A. Call the Meeting to Order		William Hall	1 m
B. Record Attendance		William Hall	1 m
Roll Call:			
William Hall, President			
Michael Humphrey, Vice President			
Steve Fraire, Clerk			
Susan Houle, Member			
Larry Alvarado, Member			
II. Pledge of Allegiance			12:02 PM
A. Led by Board President or designee.		William Hall	1 m
III. Approve/Adopt Agenda			12:03 PM
A. Agenda	Vote	William Hall	1 m
It is recommended the Board of Directors adopt as presented, the agenda for the Regular Board meeting of May 9, 2024.			
Roll Call Vote:			

	Purpose	Presenter	Time
William Hall Michael Humphrey Steve Fraire Susan Houle Larry Alvarado Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

IV. Approve Minutes

12:04 PM

A. Minutes of the Regular Board Meeting held on March 14, 2024	Approve Minutes	William Hall	1 m
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Roll Call Vote:

William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado

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

B. Minutes of the Board Study Session held on April 11, 2024	Approve Minutes	William Hall	1 m
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Roll Call Vote:

William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Larry Alvarado

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

V. Public Comment - Closed Session

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

	Purpose	Presenter	Time
VI. Adjourn to Closed Session			12:06 PM
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			12:07 PM
A. Closed Session Agenda			15 m
1. Public Employee Performance Evaluation Pursuant to Government Code 54957			
a. Performance Evaluation, Executive Director/CEO			
VIII. Reconvene Regular Meeting			12:22 PM
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.			
X. Correspondence/Proposals/Reports			12:27 PM
A. School Highlights - Presented by Heidi Gasca, Executive Director/CEO	Discuss	Heidi Gasca	5 m

	Purpose	Presenter	Time
B. Principals: Year in Review - Presented by April Saade, Elementary Principal and Lorrie Wood, Secondary Principal	Discuss	April Saade & Lorrie Wood	8 m

XI. Consent**12:40 PM**

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 - March 2024
2. Check Register - April 2024
3. Cash Payment Reports- March 2024
4. Cash Payment Reports- April 2024
5. Ratification of the BoardOnTrack Membership Renewal for 2024-25
6. Approval of School Services of California (SSC) Agreement Renewal for 2024-25
7. Approval of The Association of Personalized Learning Schools & Services (APLUS+) Membership Renewal for 2024-25

B. Consent - Education Student/Services

1. Approval of Excel Academy Handbook Revisions
2. Approval of Excel Academy Special Education Handbook Revisions
3. Approval of Master Agreement (MA) Revisions for 2024/25
4. Approval of Acknowledgement of Responsibilities (AOR) Revisions for 2024/25
5. Approval of the 2024-25 School Year Calendar Revisions
6. Approval of FlexPoint Education Cloud Renewal
7. Approval of GoGuardian Renewal
8. Approval of Goalbook Renewal
9. Approval of Presence Learning Renewal
10. Approval of Studies Weekly Renewal
11. Approval of IXL Learning Licenses Renewal
12. Approval of Kami Subscription
13. Approval of the University of California Transcript Evaluation Service (UC-TES) Agreement

C. Consent - Personnel Services

	Purpose	Presenter	Time
	1. Approval of Certificated Personnel Report 2. Approval of Classified Personnel Report 3. Virtual Teacher Salary Schedule for the 2024/25 School Year 4. Job Descriptions		

D. Consent Items - Policy Development

Approval of existing board policies revised, reviewed, and eliminated by staff for the 2022-2023 school year.

Board Policies: Revised

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

3000 Series - Business/Non-Instructional

- 3000-EA Fiscal Control Policy: Overview
- 3005-EA Fiscal Control Policy: Purchasing
- 3011-EA Fiscal Control Policy: Accounts Payable and Record Keeping
- 3015-EA Fiscal Control Policy: Accounts Receivable
- 3020-EA Fiscal Control Policy: Expenses
- 3025-EA Fiscal Control Policy: Finance and Assets
- 3100-EA CCP Code of Conduct
- 3105-EA Content and Community Provider Risk Management Policy
- 3110-EA Content and Community Provider Application and Pre-Approval

E.	Approve Consent Agenda	Vote	William Hall	1 m
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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 _____

Purpose Presenter Time

XII. Business/Financial Services 12:41 PM

- A.** Approval of Excel Academy Charter Schools Tax Form 990 Return and California Tax Form 199 Return (Draft) - Year Ended June 30, 2023, as prepared by CliftonLarsonAllen (CLA) Vote Joe Sorrera 5 m

It is recommended the Board approve the Federal Tax Form 990 Return and California Tax Form 199 Return (Draft) - Year Ended June 30, 2023, as prepared by CliftonLarsonAllen (CLA) for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: None

Roll Call Vote:

- William Hall
- Michael Humphrey
- Steve Fraire
- Susan Houle
- Larry Alvarado

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

- B.** Approval of California Charter Schools Association (CCSA) Membership for 2024-25 (Renewal) Vote Heidi Gasca 3 m

It is recommended the Board approve the CCSA Membership Renewal for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: \$25,280.50

- Warner (#2053): \$15,608.50
- Helendale (#2073): \$9,672.00

Roll Call Vote:

- William Hall
- Michael Humphrey
- Steve Fraire
- Susan Houle
- Larry Alvarado

	Purpose	Presenter	Time
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			
C. Approval of the EACS Ordering Purchase System (OPS) (Renewal)	Vote	Joe Sorrera	3 m

It is recommended the Board approve the Ordering Purchase System (OPS) Renewal for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: \$24,947.19

Warner (#2053): \$16,465.15

Helendale (#2073): \$8,482.04

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

D. Approval of Sage Intacct Accounting Service Contract (Renewal)	Vote	Joe Sorrera	3 m
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It is recommended the Board approve the Sage Intacct Accounting Service Contract Renewal for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: \$48,643.20

Warner (#2053): \$32,104.51

Helendale (#2073): \$16,538.69

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

E. Approval of the Stampli Contract (Renewal)	Vote	Joe Sorrera	3 m
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	Purpose	Presenter	Time
<p>It is recommended the Board approve the Stampli Contract Renewal for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).</p>			

Fiscal Impact: \$40,000.00
 Warner (#2053): \$24,800.00
 Helendale (#2073): \$15,200.00

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

<p>F. Approval of Irvine Office Lease with the Irvine Company LLC (Renewal)</p>	Vote	Heidi Gasca	3 m
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It is recommended the Board approve the Irvine Office Lease Renewal with the Irvine Company LLC for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: \$86,688.00
 Warner (#2053): \$57,214.08
 Helendale (#2073): \$29,473.92

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

XIII. Education Services			1:01 PM
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<p>A. Approval of Curriculum Associates Agreement for i-Ready Assessment for 2024-25 (Renewal)</p>	Vote	Heidi Gasca	3 m
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	Purpose	Presenter	Time
<p>It is recommended the Board approve the Curriculum Associates Renewal Agreement for i-Ready Assessment for 2024-25 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).</p>			

Fiscal Impact: \$34,420.00
 Warner (#2053): \$22,717.20
 Helendale (#2073): \$11,702.80

Roll Call Vote:

- William Hall
- Michael Humphrey
- Steve Fraire
- Susan Houle
- Larry Alvarado

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

- | | | | |
|--|-------------|--------------------|------------|
| <p>B. Approval of Bright Thinker Service Licenses (Renewal)</p> | <p>Vote</p> | <p>Heidi Gasca</p> | <p>3 m</p> |
|--|-------------|--------------------|------------|

It is recommended the Board approve the Bright Thinker Service Licenses Renewal for 2024-25 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: \$81,500.00
 Warner (#2053): \$53,790.00
 Helendale (#2073): \$27,710.00

Roll Call Vote:

- William Hall
- Michael Humphrey
- Steve Fraire
- Susan Houle
- Larry Alvarado

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

- | | | | |
|---|-------------|--------------------|------------|
| <p>C. Approval of Bright Thinker Services Licenses True Up</p> | <p>Vote</p> | <p>Heidi Gasca</p> | <p>3 m</p> |
|---|-------------|--------------------|------------|

It is recommended the Board approve the Bright Thinker Service Licenses True Up for 2023-24 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Purpose Presenter Time

Fiscal Impact: \$20,400.00

Warner (#2053): \$13,464.00

Helendale (#2073): \$6,936.00

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

- D. Approval of the Tutor.com (Renewal) Vote Heidi Gasca 3 m

It is recommended the Board approve the Tutor.com Renewal for the 2024-25 School Year for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: \$23,975.00

Warner (#2053): \$15,823.50

Helendale (#2073): \$8,151.50

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

XIV. Personnel Services 1:13 PM

- A. Approval of the Declaration of Need (DON) for Fully Qualified Educators Vote Megan Anderson 5 m

It is recommended the Declaration of Need (DON) for Fully Qualified Educators for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Fiscal Impact: None

Roll Call Vote:

	Purpose	Presenter	Time
William Hall			
Michael Humphrey			
Steve Fraire			
Susan Houle			
Larry Alvarado			
Moved by _____	Seconded by _____	Ayes _____ Nays _____	Absent _____

XV. Policy Development 1:18 PM

A.	Approval of New Board Policies	Vote	Joe Sorrera	5 m
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It is recommended that the Board approve the proposed policies.

Board Policies: New

3000 Series - Business/Non-Instructional

3035 - EA Designation of Authorized Personnel for Banking

Roll Call Vote:

William Hall
 Michael Humphrey
 Steve Fraire
 Susan Houle
 Larry Alvarado

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

XVI. Calendar

The next scheduled Regular Board Meeting will be held on June 13, 2024.

XVII. Comments 1:23 PM

A.	Board Comments	5 m
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B.	CEO Comments	5 m
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XVIII. Closing Items 1:33 PM

A.	Adjourn Meeting	Vote
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	Purpose	Presenter	Time
Roll Call Vote:			
William Hall			
Michael Humphrey			
Steve Fraire			
Susan Houle			
Larry Alvarado			
Moved by _____	Seconded by _____	Ayes _____	Nays _____ Absent _____

FOR MORE INFORMATION

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

Coversheet

Minutes of the Regular Board Meeting held on March 14, 2024

Section: IV. Approve Minutes
Item: A. Minutes of the Regular Board Meeting held on March 14, 2024
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Regular Meeting of the Board of Directors on March 14, 2024

APPROVED



Excel Academy (CA)

Minutes

Regular Meeting of the Board of Directors

Date and Time

Thursday March 14, 2024 at 12:10 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:

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Meeting ID: 819 3332 6100

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Directors Present

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

Directors Absent

None

Guests Present

L. Hansen

I. Opening Items

A. Call the Meeting to Order

W. Hall called a meeting of the board of directors of Excel Academy (CA) to order on Thursday Mar 14, 2024 at 12:29 PM.

B. Record Attendance

II. Approve/Adopt Agenda

A. Agenda

M. Humphrey made a motion to Bill Hall.

S. Fraire seconded the motion.

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

III. Approve Minutes

A. Minutes of the Regular Board Meeting held on February 8, 2024

S. Fraire made a motion to approve the minutes from Regular Meeting of the Board of Directors on 02-08-24.

S. Houle seconded the motion.

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

IV. Adjourn to Closed Session

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

S. Fraire made a motion to Bill Hall.

M. Humphrey seconded the motion.

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

V. Reconvene Regular Meeting

A. Report out any action taken in closed session.

No action was taken.

VI. Correspondence/Proposals/Reports

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

Heidi Gasca's presentation highlighted various achievements and events at Excel Academy, focusing on parent education, staff accomplishments, community engagement, and student activities. Key points included:

1. The success of the Parent PowerUp Conference aimed at increasing parent involvement and providing educational resources.
2. Adapting to unforeseen circumstances, such as transitioning an in-person staff meeting to virtual due to a major storm, showcasing the team's quick and effective response.
3. Acknowledgment of staff members completing coursework for their preliminary admin credentials.
4. Highlights of student activities, including field trips, outdoor classroom experiences, and leadership events like the Disneyland Leadership Day.
5. Community events and initiatives aimed at fostering connections and engagement, such as Game Time and entrepreneurial events.
6. Professional development opportunities for staff, including attendance at social media and marketing conventions.
7. Preparation for upcoming events like prom and state testing, as well as ongoing efforts in curriculum development and test preparation.

Overall, Gasca's presentation emphasized the collaborative efforts and dedication of the Excel Academy community to support student success and engagement.

B.

Student Testimonials - Student Leadership Members Connor Allen and Dalila Casanova

The students provided testimonials about their experiences with the leadership class at Excel Academy, particularly highlighting their attendance at a leadership day event at Disneyland. Delila shared how the class helped her find balance in her academic schedule, build confidence in public speaking, and develop leadership skills applicable to daily life. She emphasized the importance of setting small, achievable goals as a pathway to success, which she learned from the keynote speaker at the Disneyland event. Delila expressed her belief that more students should have the opportunity to experience such leadership classes and talks.

Connor discussed his enjoyment of meeting classmates in person and listening to the speaker at the Disneyland event. He reflected on the speaker's message about the challenge of translating intentions into actions, using his own experience in high school hockey to illustrate this point. Connor expressed gratitude to Excel Academy for providing him the opportunity to attend the leadership conference and shared his determination to achieve his goals in the future. Both students were commended for their contributions to the leadership class and exemplified the positive impact it has on students at Excel Academy.

VII. Consent

A. Consent - Business/Financial Services

B. Consent - Education Student/Services

C. Consent - Personnel Services

D. Consent Items - Policy Development

E. Approve Consent Agenda

M. Humphrey made a motion to Bill Hall.

S. Fraire seconded the motion.

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

VIII. Business/Financial Services

A. Approval of Second Interim Financial Report

S. Houle made a motion to Bill Hall.

S. Fraire seconded the motion.

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

B.

Approval of Annual Audit Engagement Services between CliftonLarsonAllen (CLA) and Excel Academy Charter Schools

M. Humphrey made a motion to Bill Hall.

S. Fraire seconded the motion.

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

C. Approval of CliftonLarsonAllen LLP (CLA) Agreement Increase

L. Alvarado made a motion to Bill Hall.

S. Houle seconded the motion.

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

D. Approval of 2024-2025 Strategic Staffing Plan, Salary Schedules, and Work Year Calendars

M. Humphrey made a motion to Bill Hall.

S. Fraire seconded the motion.

Megan presented the strategic staffing plan for the upcoming school year, highlighting various components such as compensations, salary schedules, work year calendars, and job descriptions. She discussed the collaborative process with Joe and the timeline for developing the plan. The presentation covered budget allocations for employee benefits, retirement contributions, statutory benefits, and expense reimbursements. Megan acknowledged staff milestones and announced plans to hire additional teachers for the virtual and personalized programs, as well as introduce new teacher-led classes in art and music. She outlined updates to the salary schedule, work year calendar, and job descriptions, including the creation of new positions like the lead community liaison.

Megan also recognized the new registrar.

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

IX. Education Services

A. Approval of Parsec Education Service Agreement (Renewal)

M. Humphrey made a motion to Bill Hall.

L. Alvarado seconded the motion.

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

B. Approval of the Proposition 28 - Arts & Music Funds Proposal

S. Houle made a motion to Bill Hall.

S. Fraire seconded the motion.

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

Erica Flores, Excel Academy's TOSA for grants, provided a brief overview of Proposition 28 funding. She highlighted that 80% of the funding must be spent on credentialed teachers and explained how the school plans to utilize the funds to enhance arts and music education. Specifically, they aim to offer required virtual classes for K through 6th

grade students, expand elective offerings for middle school, and introduce a new visual and performing arts class for high school focusing on project-based learning. Additionally, elementary music classes and appreciation courses for middle and high school students will be expanded. Erica expressed excitement about the opportunity to enrich students' learning experiences in arts and music.

X. Policy Development

A. Approval of New Board Policies

S. Fraire made a motion to Bill Hall.

S. Houle seconded the motion.

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

XI. Comments

A. Board Comments

The board members expressed their appreciation for the meeting and the continuous progress of the school. They commended Heidi's leadership and the hardworking staff behind her, emphasizing the success of the parent workshop and congratulating Keri and Erin on their achievements. They recognized the importance of financial oversight and student well-being, particularly mental health, in light of upcoming legislation. Overall, they praised the team's dedication and highlighted the ongoing evolution of the school from a dream to a reality. Additionally, they commended the efficient running of the meeting.

B. CEO Comments

Heidi expressed gratitude for the recognition of the team's contributions and highlighted the continuous growth and challenges faced, including legislative changes and professional development. She mentioned attending a board meeting in Helendale, emphasizing the importance of maintaining positive relationships with authorizers. Despite scrutiny at the state level, Heidi noted the investment and interest shown by board members, indicating ongoing support for the school's authorization process.

XII. Closing Items

A. Adjourn Meeting

S. Fraire made a motion to Bill Hall.

S. Houle seconded the motion.

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

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 1:37 PM.

Respectfully Submitted,

W. Hall

FOR MORE INFORMATION

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

Coversheet

Minutes of the Board Study Session held on April 11, 2024

Section: IV. Approve Minutes
Item: B. Minutes of the Board Study Session held on April 11, 2024
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Board of Directors Study Session on April 11, 2024

APPROVED



Excel Academy (CA)

Minutes

Board of Directors Study Session

Date and Time

Thursday April 11, 2024 at 10:45 AM

Location

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

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

Zoom Meeting Information:

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Directors Present

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

Directors Absent

None

Guests Present

L. Hansen

I. Opening Items

A. Call the Meeting to Order

W. Hall called a meeting of the board of directors of Excel Academy (CA) to order on Thursday Apr 11, 2024 at 11:15 AM.

B. Record Attendance

II. Approve/Adopt Agenda

A. Agenda

S. Houle made a motion to Bill Hall.

M. Humphrey seconded the motion.

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

III. Oral Presentations

A. Annual Review of Executive Director/CEO Employment Agreement, Job Description, and Evaluation - Presented by Megan Anderson, Assistant Director of Human Resources

Megan Anderson's presentation provided a comprehensive overview of the Executive Director's role and contract at Excel Academy Charter School. She highlighted the Executive Director's responsibilities in providing fearless leadership, overseeing school operations, and fostering community and stakeholder engagement. The presentation emphasized the importance of alignment with the school's mission, vision, and values, as well as adherence to state and federal policies.

Key points included:

1. The Executive Director's leadership areas: academic success, staff success, and operational efficiencies.
2. The role as a conduit between programs and the board of directors, advocating for operational excellence.
3. Ensuring adherence to state and federal policies and proactive responsiveness to legislative changes.
4. Encouraging lifelong learning for students and staff, conducting regular performance evaluations, and setting strategic objectives.
5. The annual evaluation process for the executive director, which includes collaborative goal setting with the board, performance assessment, and transparency regarding salary adjustments and contract extensions.
6. Details of the Executive Director's contract, including provisions for termination, notice requirements, and procedural steps.
7. The commitment to developing an annual timeline for contract and job description review to ensure transparency and effectiveness in oversight.

Anderson expressed gratitude to the board for their collaboration and support, offering herself and Randy Erickson as resources for any questions regarding the executive director's contract or job description.

B. Artificial Intelligence (AI) at Excel Academy: An Overview - Presented by Lauren Hansen, Senior Communications Coordinator

Lauren Hansen's presentation focused on the integration of AI tools in education, emphasizing their potential to personalize learning, enhance engagement, and streamline administrative tasks. She discussed various AI tools, such as ChatGPT, Khanmigo, and Magic School, and highlighted their applications in lesson planning, student feedback, and creating relevant learning experiences.

Key points included:

1. AI's ability to personalize learning experiences based on student interests and needs.
2. Examples of AI tools used for behavior management, communication, lesson planning, and assessment scoring.
3. The importance of refining prompts to maximize the effectiveness of AI tools.

4. Demonstrations of AI tools like Khanmigo and Magic School, showcasing their capabilities in generating lesson plans and creating relevant learning experiences.
5. The potential of AI to empower parents as primary educators through tools for feedback, text proofreading, and standards unpacking.
6. Examples of AI tools used at Excel Academy for both classified and credential staff, such as Scribe and Workspace GPT, to improve efficiency and organization.
7. The need for policies and procedures to manage AI risks effectively, including transparency, accountability, and ethical use.
8. Hansen's development of an AI policy for students to ensure ethical and responsible use of AI technology.

Overall, Hansen's presentation highlighted the transformative potential of AI in education and the importance of implementing it thoughtfully and ethically.

IV. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 12:05 PM.

Respectfully Submitted,
W. Hall

FOR MORE INFORMATION

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

Coversheet

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

Section: X. Correspondence/Proposals/Reports
Item: A. School Highlights - Presented by Heidi Gasca, Executive Director/CEO
Purpose: Discuss
Submitted by:
Related Material: EACS May 2024 Board Update.pdf

EXCEL ACADEMY March & April HIGHLIGHTS

May 9, 2024



EXCEL ACADEMY

Looking Forward to 2024-2025:

Academic Path



Personalized



Virtual

10

All About Excel Webinars
scheduled

18

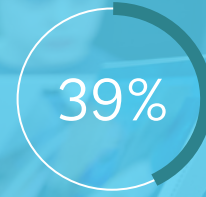
Summer Social events
for new families

3

Summer Liaisons to
support new families



Students
returning for the
2024/25 school
year



Growth in
applications from
May of 2023 to
May of 2024

**230 New Students
currently registered for the
2024-25 School Year!**



General Education Highlights

- Introduced S.O.A.R. program for junior high honors - Students Optimizing Academic Reach for 24/25
- Expanded NCAA curriculum approval to include all College Prep for the Warner scope.
- Created Curriculum Collages which provide enrichment through field trips, hands-on experiences and more that are aligned to grade-level science and social studies standards
- Designed GATE specific, and Intervention specific, core curriculum guides to best support curriculum selection for gifted or at-promise students.
- Virtual Path: Began Lexia in April as a literacy tool for 1st and 2nd grades, as well as older students in need of literacy support. For 24/25, planned an “Essentials” track for 7th/8th grade students in need of intervention, as well as additional intervention programs for all grade levels.

Assessment Updates

Summative
ELPAC
Testing -
March - May

Test prep
packets
provided to
every student
in grades 3-8,
& 11

GATE Testing
offered for
the first time!



TEST PREP SESSIONS

TEST PREP SESSIONS WITH MRS. CASSARO



ELA: Monday, April 8th
11:00 am - 12:00 pm
Math: Wednesday, April 10th
1:00 - 2:00 pm
ELA: Wednesday, April 17th
1:00 pm-2:00 pm
Math: Wednesday, April 24th
1:00 pm-2:00 pm

*3rd &
4th
Grade*

TEST PREP SESSIONS WITH MRS. HITZLER



ELA: Monday, April 8th
12:00 - 1:00 pm
Math: Thursday, April 11th
12:00 - 1:00 pm
Math: Tuesday, April 23rd
9:00 - 10:00 am

*5th &
6th
Grade*

TEST PREP SESSIONS WITH MRS. WETMORE



ELA: Tuesday, April 9th
12:00 - 1:00 pm
Math: Monday, April 8th
9:00 - 10:00 am

*7th &
8th
Grade*

TEST PREP SESSIONS WITH MRS. CHEEVER & MRS. SURMAN



ELA: Wednesday, April 10th & April 17th
12:00 - 1:00 pm
ELA: Monday, April 15th
12:00 - 1:00 pm
Math: Wednesday, April 24th
11:00 - 12:00 pm
Math: Friday, April 26th
12:00 - 1:00 pm

*11th
Grade*



48 High School Students attended our 2nd annual Prom!



EXCEL ACADEMY

OUTDOOR CLASSROOM

Bubble-ology
March 25 or 29





Students were given the opportunity to create and sell their homemade crafts and items to Excel families and friends! Over 160 Excel students set up tables and sold their handmade goods.



Professional Development in March & April

Education:

- ❖ Lexi Core 5
- ❖ CogAT Testing Platform
- ❖ Asthma, Allergies, Diabetes, Oh My! Section 504 Updates & Refresher
- ❖ Teaching an American History of Rock and Soul with TeachRock

Assessment:

- ❖ CCSC Conference
- ❖ LCAP Training Webinar
- ❖ Prop 28 Webinar

Human Resources:

- ❖ Charter Compliance: Navigating California Wage and Hour Laws
- ❖ Embracing the Future: The Shift from HR to People Management, Mastering HR Admin: Why Size Doesn't Matter
- ❖ YMC Public Records Act: Legal Updates

Special Education:

- ❖ AALRR Special Education Training Academy

Leadership

- ❖ CCSA Conference



Looking forward to...



Our very own Excel students will be performing “Dear Edwina Jr.” – a culmination of all they’ve learned in Excel’s Theater Arts Program!



The Staff will be celebrating at their annual End of Year presentation!

Powered by BoardOnTrack



Our final Excel Academy event will be held in 9 regions across Southern California, with over 500 students planning to attend!



Thank you!

Coversheet

Principals: Year in Review - Presented by April Saade, Elementary Principal and Lorrie Wood, Secondary Principal

Section: X. Correspondence/Proposals/Reports
Item: B. Principals: Year in Review - Presented by April Saade, Elementary Principal and Lorrie Wood, Secondary Principal
Purpose: Discuss
Submitted by:
Related Material: Principals - Year in Review 23_24.pdf



Principals' Year in Review

Excel Academy 2024-2025

Agenda



0 **TK-12 Collaboration**

1 Parent Power Up + Building
Community Among Staff

0 **Elementary Highlights**

2 Year in Review

0 **Secondary Highlights**

3 Year in Review

April Saade

Elementary
Principal



Lorrie Wood

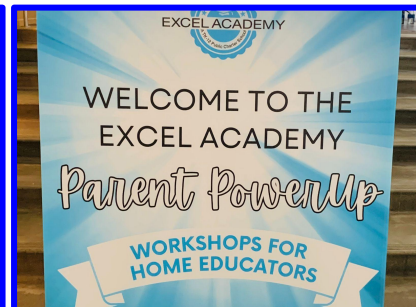
Secondary
Principal





Parent Power-Up TK-12 Collaboration

Parent Education



Workshop A	Workshop B	Workshop C
CHECK-IN		
Optional PAC Meeting for Parents		
Power of Phonics K-3	Writing Essays with Ease 5th-12th	Anxiety: How to Help TK-12
GUEST SPEAKER Cyber Safety Cop: Parenting in a Digital World		
BREAK		
Maximize Math Instruction K-6	Math Myths: Learning is Not One-Size Fits All 7th-12th	Why Can't You Just Pay Attention?! TK-12
Powered by BoardOnTrack LUNCH		

Kid Zone!



Building a Sense of Community Among Staff



EXCEL ACADEMY



Monthly Community Events



In-Person ToR Team Meetings



01

Elementary Highlights





Each day you are leading by example. Whether you realize it or not or whether it's positive or negative, you are influencing those around you.

ROB LIANO

EVERYDAYPOWER

Elementary Year in Review



Every Eagle Reads

- ★ Fluency assessments for EVERY elementary student
- ★ Dyslexia screener process in full swing
- ★ NEW Reading Intensive Class 60 mins-5 days a week Intense systematic phonics

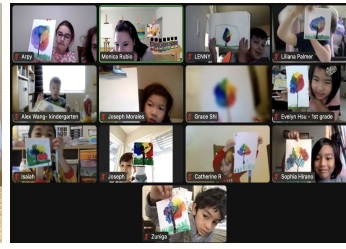
Curriculum Collage

- ★ Teachers created *Curriculum Collages* for each grade level in both science and social studies
 - ★ Matches enrichment activities (field trips, project-based learning, etc) to standards
 - ★ Enthusiastically received by parents and ToRs
- Powered by BoardOnTrack

GATE Program

- ★ Monthly enrichment activities
- ★ Sets EACS apart from other charters
- ★ First year to offer a GATE Test
- ★ CogAT measures reasoning skills with different types of verbal, quantitative, and nonverbal questions.

Elementary Year in Review



Streamlined Communication & Collaboration

- ★ Tier 1 and Tier 2 supports are more aligned than ever! Core + Intervention
- ★ Collaboration with intervention and GATE on curriculum resources for parents and ToRs

- ★ ToRs consistently collaborated with two new teams throughout the year
 - PLC groups
 - Grade-Level Teams

Coming in 2024-25

- ★ Elementary Grade-Level Homerooms
15 students + 1 teacher meet weekly to enjoy circle time or morning meeting type learning to build connection and a sense of belonging
- ★ Writing Benchmarks
Systematic assessment and support in writing across the grade levels

02

Secondary Highlights





Secondary Dream Team - Welcomed New Counselors

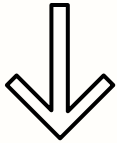
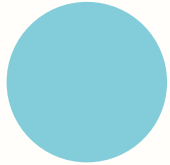


- Co-Created Career Week
- Supporting New CCI Policies
- Overseeing 504 Plans



- Created Counselor Corner Website
- Managing Crisis Concerns
- Overseeing 504 Plans

Secondary Year in Review

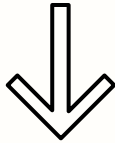
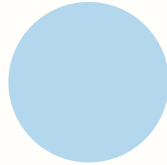


Supporting New Paths

Created new Post-It observation process

Pop-in with the Principal

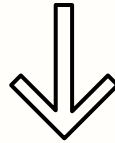
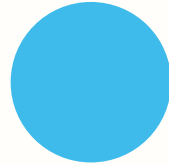
CSTP 6: Focused on supporting ToR professional development



Retention

Hosted Welcome to High School week webinar series

Developed 6th grade transition to junior high and hosted parent informational webinar and staff training

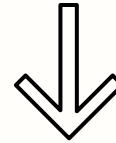


Collaboration

Partnered with Elementary team for Parent Power Up

Attended monthly community events to support school-wide events

Trained ToRs on integrating formative assessments



Vision: Looking Ahead

Expanding ETL class options to build junior high culture and offer math levels for all learning levels

Expanding junior high honors

Growing and hiring new teachers

College and Career - aiming to increase student readiness

NCAA APPROVED

Secondary Year in Review



Creating Opportunities

Created New Extracurricular Opportunities

Creating Vision

- ★ Both Helendale and Warner scopes are NCAA approved for student athletes
- ★ Both Helendale and Warner have AP course approvals

- ★ Hosted first overnight HS Catalina trip with 20 students - Huge Success
- ★ Inducted 21 NHS and 17 NJHS students
- ★ Hosted second annual high school prom - masquerade ball

- ★ AI Parent Education
- ★ Writing Assessments
- ★ Junior High Focus: building culture and community for all students

Thank you!

Coversheet

Consent - Business/Financial Services

Section: XI. Consent
Item: A. Consent - Business/Financial Services
Purpose:
Submitted by:
Related Material: Check register 030124-033124.pdf
Check register 040124-043024.pdf
3.08.24 Semi-Monthly Cash Requirement Rpt..pdf
4.10.24 Semi-monthly Cash Requirement Statement.pdf
4.26.24 Semi-Monthly Cash Requirement Statement.pdf
4.26.24 Monthly Cash Requirement Statement.pdf
Excel Academy (CA) - Renewal 2024-2025 (1).pdf
APLUS+ Invoice Excel Academy 2425.docx.pdf
APLUS+ Standard Contract Excel Academy 2425.docx (1).pdf
EACS-School Services CA Contract.pdf

BACKGROUND:

Item: APLUS+ Membership Renewal for 2024/25

Background: This agreement proposes a renewal of membership with Excel Academy and APLUS+. APLUS+ member charter schools stand out as distinguished in their commitment to the personalized learning model and to high standards of education excellence and fiscal and operational accountability. Membership includes regional and statewide meetings, legislative advocacy and networking with charter leaders and vendors. This cost includes standard membership services provided through the 2024-2025 school year. Total cost based on current student enrollment of 1,607, and includes the \$250 early payment discount.

Fiscal Impact: \$14,750

Warner: \$9,735

Helendale: \$5,015

Item: Board on Track Membership Renewal

Background: BoardOnTrack provides an annual membership that centers around an online platform custom-built for charter public school boards.

It is recommended the Board approve the one year contract with BoardOnTrack Membership as presented.

Fiscal Impact: \$5,495

Warner: \$3,626.70

Helendale: \$1,868.30

Item: School Services of California Renewal

Background: School Services of California (SSC) is an advocacy group who works with legislative problems and with coalitions to impact major statewide education policy and fiscal matters.

SSC has been at forefront of almost all of the major school finance developments over the last 40+ years, plays a significant role in initiatives such as special education equalization, revenue limit equalization, CalSTRS, member issues, categorical reform and flexibility, audit reform, school business official training, class-size flexibility, and mandate reform. By being renewing Excel Academy's membership at SSC, we have continued access to workshops, webinars, and other resources to benefit the school in the areas mentioned above.

Fiscal Impact: \$4,500

Warner: \$2,970

Helendale: \$1,530

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

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

Bank	Date	Bill date	Bill no.	Vendor	GL account or account	Method	Document no.	Amount	ount applied	Cleared	Memo	Department	Location
CHASE 9313 - Chase	3/1/2024	2/13/2024	6335-021324	6335--Chino Youth Museum	5835--Field Trips	Printed Che	Voided - 030100	-150.00	-150.00	In Transit		914--Community Engagement	2053--Excel Academy Charter School - Warner
	3/4/2024	3/4/2024	5795-030324	5795--BRMS - FSA	9516--Voluntary FSA	EFT		1,141.35	5.70	In Transmeh Zahedi		000--Schoolwide -Revenues/BS	2073--Excel Academy Charter School - Helendale
				5795--BRMS - FSA	9516--Voluntary FSA	EFT		1,141.35	9.30	In Transmeh Zahedi		000--Schoolwide -Revenues/BS	2053--Excel Academy Charter School - Warner
				5795--BRMS - FSA	9516--Voluntary FSA	EFT		1,141.35	139.02	In Trans Lara Ulmer		000--Schoolwide -Revenues/BS	2073--Excel Academy Charter School - Helendale
				5795--BRMS - FSA	9516--Voluntary FSA	EFT		1,141.35	226.83	In Trans Lara Ulmer		000--Schoolwide -Revenues/BS	2053--Excel Academy Charter School - Warner
				5795--BRMS - FSA	9516--Voluntary FSA	EFT		1,141.35	288.99	In Transimberly Platler		000--Schoolwide -Revenues/BS	2073--Excel Academy Charter School - Helendale
				5795--BRMS - FSA	9516--Voluntary FSA	EFT		1,141.35	471.51	In Transimberly Platler		000--Schoolwide -Revenues/BS	2053--Excel Academy Charter School - Warner
	3/4/2024	2/20/2024	B-268464691	v3063--Belami A. Dufrene	5880--Instructional Vendl	EFT	100160	60.00	60.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/5/2024	C236396	2538--Memoria Press	4100--Textbooks & Core t	EFT	100145	47.34	47.34	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/6/2024	501993	2129--Studies Weekly	4100--Textbooks & Core t	EFT	100168	43.05	43.05	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	1/26/2024	19079	1243--JacKris Publishing, LLC	4100--Textbooks & Core t	EFT	100182	30.99	30.99	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/1/2024	565665	1179--Home Science Tools	4310--Materials & Supplie	EFT	100157	29.12	29.12	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/2/2024	681	4224--Curiosity Chronicles	4100--Textbooks & Core t	EFT	100175	15.00	15.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/23/2024	122235821	5517--PROMO Direct	5841--Community Market	EFT	100148	461.85	286.35	In Transit		913--Marketing	2053--Excel Academy Charter School - Warner
				5517--PROMO Direct	5841--Community Market	EFT	100148	461.85	175.50	In Transit		913--Marketing	2073--Excel Academy Charter School - Helendale
	3/4/2024	1/23/2024	268380074	5469--Let's Bake Baking Kits	4100--Textbooks & Core t	EFT	100166	445.98	396.43	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		2/7/2024	268429522	5469--Let's Bake Baking Kits	4100--Textbooks & Core t	EFT	100166	445.98	49.55	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	1/26/2024	SI-200547	1978--The Logic of English	4100--Textbooks & Core t	EFT	100173	368.87	97.50	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		2/2/2024	SI-201159	1978--The Logic of English	4100--Textbooks & Core t	EFT	100173	368.87	101.89	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		2/2/2024	SI-201151	1978--The Logic of English	4100--Textbooks & Core t	EFT	100173	368.87	71.98	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		2/1/2024	SI-201084	1978--The Logic of English	4100--Textbooks & Core t	EFT	100173	368.87	97.50	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/24/2024	B-268472910	5514--Pleasant Street Stable	5880--Instructional Vendl	EFT	100147	360.00	360.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	1/31/2024	8143	1260--McRuffy Press, LLC	4100--Textbooks & Core t	EFT	100177	302.85	270.90	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		2/5/2024	8150	1260--McRuffy Press, LLC	4100--Textbooks & Core t	EFT	100177	302.85	31.95	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/20/2024	B-268464683	3084--Marcos Moscat	5880--Instructional Vendl	EFT	100152	280.00	280.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/5/2024	123252	1303--Royal Fireworks Press	4100--Textbooks & Core t	EFT	100178	279.95	279.95	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/6/2024	Feb-24	5765--Horizon Therapy Services	5100--SpEd Consultants	EFT	100180	270.00	270.00	In Trans	OT Services	907--Special Education	2073--Excel Academy Charter School - Helendale
	3/4/2024	1/26/2024	2006	v3105--eat2explore, Inc.	4100--Textbooks & Core t	EFT	100167	254.85	104.85	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		2/7/2024	2051	v3105--eat2explore, Inc.	4100--Textbooks & Core t	EFT	100167	254.85	150.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/20/2024	B-268464698	6034--Noelle Fitness	5880--Instructional Vendl	EFT	100169	232.00	232.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/2/2024	SHOP222296235	6177--CrunchLabs LLC	4100--Textbooks & Core t	EFT	100179	193.63	193.63	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	1/25/2024	IN-6270	1339--Elemental Science (Elemental Science,	4100--Textbooks & Core t	EFT	100144	189.18	189.18	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/7/2024	455627	3031--Essentials in Writing	4100--Textbooks & Core t	EFT	100174	186.95	167.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		2/9/2024	333174	3031--Essentials in Writing	4100--Textbooks & Core t	EFT	100174	186.95	19.95	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/3/2024	4947	5102--Hands 4 Building	4100--Textbooks & Core t	EFT	100183	157.99	157.99	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/2/2024	USI100662008	2537--Tower Garden	4310--Materials & Supplie	EFT	100171	146.54	146.54	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/2/2024	3921	5051--Outside the Box Creations LLC	4100--Textbooks & Core t	EFT	100142	139.35	139.35	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/5/2024	300224	1224--Oak Meadow Inc	4100--Textbooks & Core t	EFT	100172	116.13	116.13	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/13/2024	193707A	2603--Nature Watch (Minds on Education Inc)	4310--Materials & Supplie	EFT	100151	111.77	111.77	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/8/2024	54832	1211--Teaching Textbooks	4100--Textbooks & Core t	EFT	100161	104.90	45.95	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		2/5/2024	54784	1211--Teaching Textbooks	4100--Textbooks & Core t	EFT	100161	104.90	58.95	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/9/2024	7913	2699--Nicole the Math Lady, LLC.	4100--Textbooks & Core t	EFT	100170	99.00	99.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/6/2024	5229	2327--Ivy Kids LLC	4100--Textbooks & Core t	EFT	100153	79.90	39.95	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		2/6/2024	5228	2327--Ivy Kids LLC	4100--Textbooks & Core t	EFT	100153	79.90	39.95	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/7/2024	2842588271	1376--EMH Sports USA, Inc.	5100--SpEd Consultants	EFT	100146	1,805.00	1,425.00	In Trans	APE services	907--Special Education	2053--Excel Academy Charter School - Warner
		2/7/2024	284-258828-1	1376--EMH Sports USA, Inc.	5100--SpEd Consultants	EFT	100146	1,805.00	380.00	In Trans	APE Services	907--Special Education	2073--Excel Academy Charter School - Helendale
	3/4/2024	2/16/2024	B-268464694	2174--Gracie Barra Corona	5880--Instructional Vendl	EFT	100162	1,754.00	1,754.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	2/9/2024	9001792349	6039--National Association of Secondary Scho	9330--Prepaid Expenses	EFT	100163	1,540.00	385.00	In Transit		912--Administration/Office	2053--Excel Academy Charter School - Warner
		2/9/2024	9001782371	6039--National Association of Secondary Scho	9330--Prepaid Expenses	EFT	100163	1,540.00	385.00	In Transit		912--Administration/Office	2053--Excel Academy Charter School - Warner
		2/9/2024	9001792350	6039--National Association of Secondary Scho	9330--Prepaid Expenses	EFT	100163	1,540.00	385.00	In Transit		912--Administration/Office	2073--Excel Academy Charter School - Helendale
		2/9/2024	9001782372	6039--National Association of Secondary Scho	9330--Prepaid Expenses	EFT	100163	1,540.00	385.00	In Transit		912--Administration/Office	2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/5/2024	2/16/2024	2089-032024	5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE	3990--PY Benefit Adjustr EFT 3990--PY Benefit Adjustr EFT 3990--PY Benefit Adjustr EFT 3990--PY Benefit Adjustr EFT 3990--PY Benefit Adjustr EFT 3990--PY Benefit Adjustr EFT	20136004276 20136004276 20136004276 20136004276 20136004276 20136004276	117,066.91 117,066.91 117,066.91 117,066.91 117,066.91 117,066.91	7,980.55 36,470.39 59,589.37 2.04 3.32 13,021.24	In Transit In Transit In Transit In Transit In Transit In Transit	000--Schoolwide -Revenues/BS 000--Schoolwide -Revenues/BS 000--Schoolwide -Revenues/BS 000--Schoolwide -Revenues/BS 000--Schoolwide -Revenues/BS 000--Schoolwide -Revenues/BS	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 2053--Excel Academy Charter School - Warner
3/5/2024	2/2/2024	202217-73619	5470--Florida Virtual School 5470--Florida Virtual School	4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT	20136004256 20136004256	8,075.00 8,075.00	1,425.00 6,650.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/5/2024	2/5/2024 2/7/2024 2/6/2024 2/1/2024 2/6/2024 2/8/2024 2/2/2024 1/31/2024 2/6/2024 2/7/2024 2/2/2024 2/6/2024 2/1/2024 2/2/2024 2/6/2024 2/2/2024 2/12/2024 2/7/2024 2/6/2024	635373 638273 637961 633979 637957 639078 635160 633005 637958 639032 635240 637955 632999 634098 637959 635162 643966 639075 637960	1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc 1201--Rainbow Resource Center, Inc	4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT	20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253 20136004253	3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30 3,112.30	54.81 116.21 287.58 74.88 44.18 299.32 31.48 152.01 168.97 42.52 112.17 138.85 471.16 130.26 450.66 51.08 275.25 120.05 40.31 50.55	In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit 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 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 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 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
3/5/2024	2/22/2024	B-268464707	3212--WriteATHome, Inc. 3212--WriteATHome, Inc.	5880--Instructional Vend EFT 5880--Instructional Vend EFT	20136004261 20136004261	898.50 898.50	299.00 599.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/5/2024	2/25/2024	B-268472918	2769--Preston's Piano Studio	5880--Instructional Vend EFT	20136004269	851.00	851.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/5/2024	2/2/2024 1/26/2024 2/2/2024	IN-0000997495 IN-0000997461 IN-0000997522	1312--Little Passports 1312--Little Passports 1312--Little Passports	4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT	20136004274 20136004274 20136004274	755.60 755.60 755.60	377.80 188.90 188.90	In Transit In Transit In Transit	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
3/5/2024	2/21/2024	B-268464697	3301--Karen J Smith	5880--Instructional Vend EFT	20136004260	690.00	690.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/5/2024	1/31/2024	1251	2276--KiwiCo., Inc. 2276--KiwiCo., Inc.	4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT	20136004275 20136004275	682.77 682.77	474.92 207.85	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/5/2024	2/21/2024	B-268464687	3126--Archery Champs	5880--Instructional Vend EFT	20136004264	666.50	666.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/5/2024	2/16/2024	B-268464685	2577--Amanda Leigh Holiday	5880--Instructional Vend EFT	20136004272	631.00	631.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/5/2024	2/2/2024 2/7/2024	INV2307744 INV2307800	1321--Art of Problem Solving 1321--Art of Problem Solving	4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT	20136004259 20136004259	516.16 516.16	126.16 390.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
3/5/2024	2/27/2024	B-268471206	2279--Cogito International, Inc 2279--Cogito International, Inc	5880--Instructional Vend EFT 5880--Instructional Vend EFT	20136004265 20136004265	510.30 510.30	260.00 250.30	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/5/2024	2/20/2024	B-268464699	1500--Optimus Learning School 1500--Optimus Learning School	5880--Instructional Vend EFT 5880--Instructional Vend EFT	20136004263 20136004263	480.00 480.00	380.00 100.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/5/2024	2/16/2024	Admin-2089-0320	5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA	3990--PY Benefit Adjustr EFT 3990--PY Benefit Adjustr EFT 3990--PY Benefit Adjustr EFT 3990--PY Benefit Adjustr EFT	20136004258 20136004258 20136004258 20136004258	117.00 117.00 117.00 117.00	20.15 12.35 52.39 32.11	In Transit In Transit In Transit In Transit	000--Schoolwide -Revenues/BS 000--Schoolwide -Revenues/BS 000--Schoolwide -Revenues/BS 000--Schoolwide -Revenues/BS	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/6/2024	3/6/2024	6346-030624	6346--Handel's La Canada 6346--Handel's La Canada	4330--Meals & Events Printed Che 4330--Meals & Events Printed Che	30105 30105	160.00 160.00	99.20 60.80	In Transit In Transit	914--Community Engagement 914--Community Engagement	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/6/2024	2/13/2024	6335-021324	6335--Chino Youth Museum	5835--Field Trips Printed Che	30104	150.00	150.00	In Transit	914--Community Engagement	2053--Excel Academy Charter School - Warner
3/18/2024	2/6/2024	54800	1211--Teaching Textbooks	4100--Textbooks & Core t EFT	100277	45.95	45.95	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	9/19/2023	7974	1260--McRuffy Press, LLC	4100--Textbooks & Core t EFT	100351	39.90	39.90	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	8/18/2023	7742	1260--McRuffy Press, LLC	4100--Textbooks & Core t EFT	100327	39.90	39.90	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	1/31/2024	2401	6310--Growing Healthy Children Therapy Serv	5100--SpEd Consultants t EFT	100209	39.27	39.27	In Trans	OT Services 907--Special Education	2073--Excel Academy Charter School - Helendale
3/18/2024	2/9/2024	US-2024-000995	5899--Lulu Press, Inc.	4100--Textbooks & Core t EFT	100303	18.36	18.36	In Transit	908--Intervention/Title I	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506776	4142--Code Ninjas Ladera Ranch	5880--Instructional Vend EFT	100339	219.00	219.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506684	5864--Aquatic Explorations and Safety Trainin 5864--Aquatic Explorations and Safety Trainin	5880--Instructional Vend EFT 5880--Instructional Vend EFT	100307 100307	216.00 216.00	108.00 108.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/23/2024	1660	v3055--Green Kid Crafts	4100--Textbooks & Core t EFT	100237	214.21	214.21	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/27/2024	3106549001	5360--Pitney Bowes Global Financial Services 5360--Pitney Bowes Global Financial Services	5620--Equipment Leases EFT 5620--Equipment Leases EFT	100309 100309	205.34 205.34	78.03 127.31	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/18/2024	3/4/2024	B-268506767	6165--Catherine Croisette Cello	5880--Instructional Vends EFT	100223	200.00	200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	1/4/2024	B-268380779	1166--Math Learning Redondo Beach	5880--Instructional Vends EFT	100187	199.50	199.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/15/2024 2/21/2024 2/29/2024	SI-202197 SI-202588 SI-203216	1978--The Logic of English 1978--The Logic of English 1978--The Logic of English	4100--Textbooks & Core t EFT 4310--Materials & Supplie EFT 4100--Textbooks & Core t EFT	100255 100255 100255	190.10 190.10 190.10	177.12 0.99 11.99	In Transit In Transit In Transit	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	
3/18/2024	3/5/2024	B-268506949	3365--South Coast Repertory, Inc.	5880--Instructional Vends EFT	100308	186.67	186.67	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/5/2024	B-268506956	5833--Susan Sanders	5880--Instructional Vends EFT	100324	180.00	180.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/28/2024	B-268481883	6230--Just Us Learners	5880--Instructional Vends EFT	100231	180.00	180.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/29/2024	B-268481826	2572--Focus Dance Center	5880--Instructional Vends EFT	100194	180.00	180.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/2/2024	B-268506907	6163--One World Many Views - Discover Art	5880--Instructional Vends EFT	100211	160.00	160.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/23/2024	6.873E+13	5601--Atkinson, Andelson, Loya, Ruud & Romi 5601--Atkinson, Andelson, Loya, Ruud & Romi	5895--Professional Develc EFT 5895--Professional Develc EFT	100207 100207	159.00 159.00	98.58 60.42	In Transit In Transit	906--Education Services 906--Education Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
3/18/2024	2/29/2024	B-268481738	v3022--Fired Up Arts	5880--Instructional Vends EFT	100340	158.00	158.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/26/2024	B-268481737	5591--Faith Seymour Tutoring Services	5880--Instructional Vends EFT	100341	150.00	150.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	3/1/2024	B-268481905	2288--Kicks Taekwondo Riverside Inc.	5880--Instructional Vends EFT	100343	150.00	150.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/1/2024	B-268481979	4140--Legacy of Valor & Excellence	5880--Instructional Vends EFT	100195	150.00	150.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/29/2024	16158261	5296--LEAF 5296--LEAF	5620--Equipment Leases EFT 5620--Equipment Leases EFT	100190 100190	143.86 143.86	89.19 54.67	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
3/18/2024	2/29/2024	B-268488016	2086--Sylvan Learning of Torrance	5880--Instructional Vends EFT	100275	126.00	126.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	3/4/2024	B-268506879	5468--Michelle's Keys Piano Studio	5880--Instructional Vends EFT	100323	120.00	120.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/13/2024	193706A	2603--Nature Watch (Minds on Education Inc)	4310--Materials & Supplie EFT	100310	113.66	113.66	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/26/2024	B-268487834	1698--Noonan Family Swim School San Diego	5880--Instructional Vends EFT	100245	112.00	112.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/23/2024	B-268481734	1615--Esther Bril	5880--Instructional Vends EFT	100280	110.00	110.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/16/2024	56918750	1290--Scholastic Inc.	4310--Materials & Supplie EFT	100283	105.51	105.51	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/22/2024	2174	6263--Total Safety Solutions LLC 6263--Total Safety Solutions LLC	4310--Materials & Supplie EFT 4310--Materials & Supplie EFT	100204 100204	100.00 100.00	62.00 38.00	In Transit In Transit	906--Education Services 906--Education Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
3/18/2024	2/22/2024	22494	2445--Beautiful Feet Books, Inc.	4100--Textbooks & Core t EFT	100293	78.07	78.07	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	3/1/2024	B-268481843	1866--Giordano's ATA Martial Arts	5880--Instructional Vends EFT	100234	75.00	75.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/27/2024	B-268488024	5886--The Backyard Schoolhouse	5880--Instructional Vends EFT	100214	75.00	75.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/4/2024	B-268506730	1849--Art Steps, Inc Yorba Linda	5880--Instructional Vends EFT	100336	65.00	65.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/21/2024	470331A	2602--Acorn Naturalists	4310--Materials & Supplie EFT	100295	61.77	61.77	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/22/2024	EX2024.01	5400--Therapy in Action	5100--SpEd Consultants t EFT	100251	330.00	330.00	In Trans	OT Services	907--Special Education	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506889	6133--Murphy Language Arts LLC	5880--Instructional Vends EFT	100330	311.25	311.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/29/2024	B-268487974	2107--Rockstars of Tomorrow, Inc - Norco	5880--Instructional Vends EFT	100318	310.00	310.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/4/2024	B-268506871	6241--Mathnasium of Riverside	5880--Instructional Vends EFT	100316	310.00	310.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/29/2024	B-268482013	v2672--Mathnasium of Mission Viejo	5880--Instructional Vends EFT	100292	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/5/2024	B-268506921	6030--Providence Heart Ranch	5880--Instructional Vends EFT	100326	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/18/2024 2/16/2024 2/20/2024 2/18/2024 2/14/2024	19172 19165 19182 19173 19159	1243--JacKris Publishing, LLC 1243--JacKris Publishing, LLC 1243--JacKris Publishing, LLC 1243--JacKris Publishing, LLC 1243--JacKris Publishing, LLC	4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT	100215 100215 100215 100215 100215	295.51 295.51 295.51 295.51 295.51	27.99 105.77 27.99 27.99 105.77	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	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	
3/18/2024	3/5/2024	B-268506830	4178--JKWInnovations	5880--Instructional Vends EFT	100252	292.00	292.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/24/2024	B-268481722	6147--DK Tutoring	5880--Instructional Vends EFT	100264	290.00	290.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/13/2024 2/1/2024 2/8/2024	207328 207307 207320	2074--Thinkwell Corporation 2074--Thinkwell Corporation 2074--Thinkwell Corporation	4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT 4100--Textbooks & Core t EFT	100306 100306 100306	284.09 284.09 284.09	56.09 159.00 69.00	In Transit In Transit In Transit	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	
3/18/2024	2/28/2024	2162	6309--Champions Services Incorporated	5100--SpEd Consultants t EFT	100239	281.25	281.25	In Trans	APE Services	907--Special Education	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268487995	v3029--South OC Hybrid Homeschool	5880--Instructional Vends EFT	100338	280.00	280.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/18/2024	3/2/2024	B-268506958	5998--Temecula Music Teacher LLC	5880--Instructional Vends EFT	100322	274.00	274.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481702	v3140--Cadenza Music Academy v3140--Cadenza Music Academy	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100304 100304	261.01 261.01	162.50 98.51	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/18/2024	2/21/2024 2/21/2024 2/6/2024 2/15/2024	502640 502639 501992 502424	2129--Studies Weekly 2129--Studies Weekly 2129--Studies Weekly 2129--Studies Weekly	4100--Textbooks & Core EFT 4100--Textbooks & Core EFT 4100--Textbooks & Core EFT 4100--Textbooks & Core EFT	100221 100221 100221 100221	260.68 260.68 260.68 260.68	86.09 87.49 43.45 43.65	In Transit In Transit In Transit In Transit	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 2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481971	5529--Lanterns Global LLC	5880--Instructional Vends EFT	100315	260.00	260.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	B-268481990	5884--Master Lee's Kung Fu San Soo 5884--Master Lee's Kung Fu San Soo	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100333 100333	258.98 258.98	159.00 99.98	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506843	6116--Karate Foothill Ranch/Lake Forest	5880--Instructional Vends EFT	100240	255.00	255.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481646	3084--Marcos Moscat	5880--Instructional Vends EFT	100287	250.00	250.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481967	6093--Dennis Frayne Music Studio	5880--Instructional Vends EFT	100232	247.60	247.60	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/15/2024 2/14/2024	123371 123361	1303--Royal Fireworks Press 1303--Royal Fireworks Press	4100--Textbooks & Core EFT 4100--Textbooks & Core EFT	100314 100314	247.50 247.50	137.50 110.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
3/18/2024	2/29/2024	B-268487935	1018--Reynaldo & Maria Laura D'Angelo DBA I	5880--Instructional Vends EFT	100233	243.75	243.75	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/26/2024	B-268481863	5890--Jill Sturkie	5880--Instructional Vends EFT	100288	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/20/2024	SINV8933	3210--Bright Thinker	4100--Textbooks & Core EFT	100205	238.15	238.15	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506986	5902--Waterworks Swim School Diamond Bar	5880--Instructional Vends EFT	100260	236.00	236.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	1/31/2024	1235716	1276--Morey's Music Store, inc.	4310--Materials & Supplie EFT	100229	225.66	225.66	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506942	5941--Russian School of Mathematics South C	5880--Instructional Vends EFT	100347	224.50	224.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/27/2024	B-268481685	1694--Beaumont Music Centre	5880--Instructional Vends EFT	100289	224.00	224.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/4/2024	B-268506734	3015--Art Steps, Inc. Costa Mesa	5880--Instructional Vends EFT	100285	221.00	221.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/26/2024	B-268481913	6217--Kirsten A Lewis	5880--Instructional Vends EFT	100191	220.00	220.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/3/2024	B-268506865	6171--Lucky Duck Swim School	5880--Instructional Vends EFT	100226	514.00	514.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/29/2024	B-268487963	5589--Rock Fitness	5880--Instructional Vends EFT	100216	510.00	510.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/2/2024	B-268506937	5453--Riverside Ballet Arts	5880--Instructional Vends EFT	100243	500.00	500.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481658	6125--Applause Music Academy Rancho Cucar	5880--Instructional Vends EFT	100235	492.00	492.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/27/2024	B-268487983	5580--Russian School of Mathematics Irvine	5880--Instructional Vends EFT	100269	491.00	491.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506853	6213--KS Fitness, Inc.	5880--Instructional Vends EFT	100298	490.00	490.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481731	2192--Drawn2Art Northridge	5880--Instructional Vends EFT	100278	480.00	480.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/27/2024	B-268481705	2609--Candi Chavez	5880--Instructional Vends EFT	100311	480.00	480.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/5/2024	B-268506978	2627--Veronica Richards Violin Studio 2627--Veronica Richards Violin Studio	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100241 100241	464.00 464.00	300.00 164.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268482018	1896--Mission Renaissance 1896--Mission Renaissance	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100200 100200	454.85 454.85	275.60 179.25	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506763	2199--Burbank Music Academy	5880--Instructional Vends EFT	100345	450.00	450.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/29/2024	B-268481974	6278--Learn Beyond the Book LLC	5880--Instructional Vends EFT	100197	426.78	426.78	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506816	4110--Gabrina Casillas Owen	5880--Instructional Vends EFT	100328	420.00	420.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/13/2024	MA63380025	1151--Apple Inc	4310--Materials & Supplie EFT	100257	408.16	408.16	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/20/2024	300346	1224--Oak Meadow Inc	4100--Textbooks & Core EFT	100302	402.12	402.12	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506754	6162--Blooming Anomaly	5880--Instructional Vends EFT	100250	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/14/2024 2/2/2024 2/14/2024	2.3033E+11 1.99446E+11 2.30336E+11	2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials	4310--Materials & Supplie EFT 4310--Materials & Supplie EFT 4310--Materials & Supplie EFT	100206 100206 100206	395.79 395.79 395.79	227.66 39.30 128.83	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
3/18/2024	3/1/2024	14407	5017--Alpha Vision, Inc. 5017--Alpha Vision, Inc.	5940--Technology Service EFT 5940--Technology Service EFT	100344 100344	379.00 379.00	234.98 144.02	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506954	5675--South OC Sports	5880--Instructional Vends EFT	100218	378.00	378.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481732	3245--KidsArt Glendora Inc.	5880--Instructional Vends EFT	100201	376.00	376.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/18/2024	2/22/2024	B-268488029	v3112--VCMA Villatoro Champion Martial Arts v3112--VCMA Villatoro Champion Martial Arts	5880--Instructional Vende EFT 5880--Instructional Vende EFT	100305 100305	367.00 367.00	268.00 99.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
3/18/2024	2/16/2024 2/7/2024 2/15/2024	569342 567015 569101	1179--Home Science Tools 1179--Home Science Tools 1179--Home Science Tools	4310--Materials & Supplie EFT 4100--Textbooks & Core (EFT 4310--Materials & Supplie EFT	100297 100297 100297	362.05 362.05 362.05	22.25 311.16 28.64	In Transit In Transit In Transit	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	
3/18/2024	3/1/2024	B-268506859	6264--Laguna Dance Theatre	5880--Instructional Vende EFT	100258	360.00	360.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/23/2024	B-268487955	6020--R. I. C. A. Dance	5880--Instructional Vende EFT	100248	359.00	359.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/29/2024	B-268482044	5816--Monrovia Music Academy	5880--Instructional Vende EFT	100272	358.00	358.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/2/2024 2/2/2024 2/13/2024 2/13/2024 2/14/2024	S305615 S305618 S306533 S306534 S306636	1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc	4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT	100291 100291 100291 100291 100291	353.49 353.49 353.49 353.49 353.49	85.00 85.00 45.00 44.52 93.97	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	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
3/18/2024	2/29/2024	B-268481696	v3063--Belami A. Dufrene	5880--Instructional Vende EFT	100348	350.00	350.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/29/2024	B-268481859	v3137--Hector Y. Martinez	5880--Instructional Vende EFT	100290	350.00	350.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/1/2024	B-268506928	5575--Red Dragon Karate	5880--Instructional Vende EFT	100312	349.20	349.20	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	1/17/2024 2/68397394 1/11/2024	268384393 268397394 268368971	5006--Maryilyn Zessin 5006--Maryilyn Zessin 5006--Maryilyn Zessin	4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT	100199 100199 100199	330.00 330.00 330.00	99.00 198.00 33.00	In Transit In Transit In Transit	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	
3/18/2024	2/29/2024	B-268487936	1648--Portal Languages Fullerton LLC 1648--Portal Languages Fullerton LLC	5880--Instructional Vende EFT 5880--Instructional Vende EFT	100299 100299	880.00 880.00	640.00 240.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
3/18/2024	3/1/2024	B-268506762	4101--Yvonne Dill Cruz	5880--Instructional Vende EFT	100321	875.00	875.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	3/5/2024	B-268506761	2806--Brain Builders STEM Education 2806--Brain Builders STEM Education	5880--Instructional Vende EFT 5880--Instructional Vende EFT	100329 100329	875.00 875.00	784.00 91.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
3/18/2024	2/16/2024 2/7/2024 2/8/2024	919993 919851 919857	5016--All About Learning Press, Inc 5016--All About Learning Press, Inc 5016--All About Learning Press, Inc	4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT	100230 100230 100230	867.79 867.79 867.79	327.79 331.36 208.64	In Transit In Transit In Transit	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	
3/18/2024	3/5/2024	B-268506803	1854--Firestorm Freerunning Ultra LLC	5880--Instructional Vende EFT	100276	865.00	865.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/26/2024	B-268487830	1022--Noonan Family Swim School Murrieta	5880--Instructional Vende EFT	100228	853.50	853.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/28/2024	B-268481940	6294--Kumon Math and Reading of Laguna Hi	5880--Instructional Vende EFT	100346	840.00	840.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/29/2024	B-268488025	1917--The Center Stage Studio	5880--Instructional Vende EFT	100213	831.67	831.67	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/29/2024	B-268481716	3172--Dancing Keys Music Studio LLC	5880--Instructional Vende EFT	100335	830.50	830.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/26/2024	B-268488021	5682--The Art House 5682--The Art House	5880--Instructional Vende EFT 5880--Instructional Vende EFT	100238 100238	797.50 797.50	667.50 130.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
3/18/2024	2/29/2024	B-268488061	2092--World Elite Gymnastics	5880--Instructional Vende EFT	100273	781.80	781.80	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/1/2024	B-268506794	2506--KidsArt Claremont Inc.	5880--Instructional Vende EFT	100261	776.00	776.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	3/3/2024	B-268506856	6028--Kumon Math and Reading of Norco 6028--Kumon Math and Reading of Norco	5880--Instructional Vende EFT 5880--Instructional Vende EFT	100350 100350	775.00 775.00	465.00 310.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
3/18/2024	2/16/2024	1735	v3068--Mr. D Math, LLC v3068--Mr. D Math, LLC	5880--Instructional Vende EFT 5880--Instructional Vende EFT	100270 100270	769.00 769.00	507.00 262.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
3/18/2024	3/2/2024	B-268506793	1855--Dorothy McCandliss	5880--Instructional Vende EFT	100337	738.00	738.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	3/1/2024 2/27/2024	B-268506988 B-268488052	5649--Waterworks Swim School Yorba Linda 5649--Waterworks Swim School Yorba Linda	5880--Instructional Vende EFT 5880--Instructional Vende EFT	100196 100196	735.22 735.22	594.04 141.18	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner	
3/18/2024	3/1/2024	B-268506915	3364--Pacific Ballet Conservatory	5880--Instructional Vende EFT	100246	700.50	700.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	3/1/2024	B-268488002	5487--Southland Ballet Academy	5880--Instructional Vende EFT	100332	699.00	699.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	1/31/2024 3/1/2024	W134848-IN 0141149-IN	5756--School Services of California, Inc. 5756--School Services of California, Inc. 5756--School Services of California, Inc. 5756--School Services of California, Inc.	5895--Professional Develc EFT 5895--Professional Develc EFT 5300--Dues & Membersh, EFT 5300--Dues & Membersh, EFT	100282 100282 100282 100282	680.00 680.00 680.00 680.00	201.50 123.50 220.10 134.90	In Trans In Trans In Transit In Transit	Joe Sorre Joe Sorre 909--Administration/Office 909--Administration/Office	909--Business Services 909--Business Services 912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506897	6159--Nino's Art Studio	5880--Instructional Vende EFT	100301	650.00	650.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/18/2024	2/28/2024	B-268481728	1383--Drawn2Art Chino Hills	5880--Instructional Vende EFT	100265	640.00	640.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/18/2024	2/23/2024	Feb2024JW	5765--Horizon Therapy Services 5765--Horizon Therapy Services	5100--SpEd Consultants & EFT 5100--SpEd Consultants & EFT	100192 100192	630.00 630.00	360.00 270.00	In Trans In Trans	OT Services Transpeech Services	907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	163256	v3100--Oxford Consulting Services, Inc.	5100--SpEd Consultants & EFT	100274	624.00	624.00	In Trans	SAI Services	907--Special Education	2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/18/2024	3/1/2024	B-268506745	5996--Belmont Music Studio Music Lessons	5880--Instructional Vends EFT	100212	615.00	615.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/25/2024	B-268481681	4153--Beach Tutors	5880--Instructional Vends EFT	100271	603.00	603.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/27/2024	B-268481709	4118--Kyungeun Christina Lee	5880--Instructional Vends EFT	100300	600.00	600.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506758	6049--Blossom Hill Ranch LLC	5880--Instructional Vends EFT	100203	590.00	590.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/16/2024	99903	3031--Essentials in Writing	4100--Textbooks & Core EFT	100253	535.30	148.40	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	2/21/2024	455120	3031--Essentials in Writing	4100--Textbooks & Core EFT	100253	535.30	219.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	2/7/2024	500801	3031--Essentials in Writing	4100--Textbooks & Core EFT	100253	535.30	167.40	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/5/2024	B-268506861	6244--Learning Squad OC	5880--Instructional Vends EFT	100281	529.98	529.98	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/2/2024	SHOP222296240	6177--CrunchLabs LLC	4100--Textbooks & Core EFT	100320	519.22	193.63	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/6/2024	SHOP221903531	6177--CrunchLabs LLC	4100--Textbooks & Core EFT	100320	519.22	325.59	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/4/2024	B-268506850	v3080--Kaser Arts	5880--Instructional Vends EFT	100266	2,887.25	1,818.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			v3080--Kaser Arts	5880--Instructional Vends EFT	100266	2,887.25	1,068.75	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506827	5714--Irene School of Rhythmic Gymnastics	5880--Instructional Vends EFT	100202	2,789.50	2,789.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	B-268487922	v3032--Peace Hill Classical Co-op LLC	5880--Instructional Vends EFT	100294	2,682.00	2,337.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			v3032--Peace Hill Classical Co-op LLC	5880--Instructional Vends EFT	100294	2,682.00	345.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506842	v3067--K2 Studios, LLC	5880--Instructional Vends EFT	100279	2,370.56	1,239.56	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			v3067--K2 Studios, LLC	5880--Instructional Vends EFT	100279	2,370.56	1,131.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506765	1355--C3 Classes, LLC	5880--Instructional Vends EFT	100244	2,108.33	2,108.33	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/3/2024	B-268506894	5557--Music Lessons with Jena	5880--Instructional Vends EFT	100319	2,024.66	2,024.66	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/26/2024	B-268481669	5641--Ark Academy	5880--Instructional Vends EFT	100256	2,000.00	1,435.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			5641--Ark Academy	5880--Instructional Vends EFT	100256	2,000.00	565.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506979	2144--Waterworks Aquatics Pasadena	5880--Instructional Vends EFT	100249	1,965.92	1,793.36	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	2/28/2024	B-268488050	2144--Waterworks Aquatics Pasadena	5880--Instructional Vends EFT	100249	1,965.92	172.56	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/26/2024	B-268488020	6188--Telos Academy	5880--Instructional Vends EFT	100263	1,930.50	1,930.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/12/2024	7321073	5411--Total Education Solutions	5100--SpEd Consultants EFT	100331	1,908.75	1,147.50	In Trans	APE Services	907--Special Education
	2/27/2024	7394660	5411--Total Education Solutions	5100--SpEd Consultants EFT	100331	1,908.75	405.00	In Trans	APE Services	907--Special Education
			5411--Total Education Solutions	5100--SpEd Consultants EFT	100331	1,908.75	356.25	In Trans	SAI Services	907--Special Education
3/18/2024	#####	1223	5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants EFT	100219	1,855.63	725.00	In Trans	Speech Services	907--Special Education
	#####	EXCL02-1223	5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants EFT	100219	1,855.63	315.00	In Trans	Speech Services	907--Special Education
			5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants EFT	100219	1,855.63	465.63	In Trans	OT Services	907--Special Education
			5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants EFT	100219	1,855.63	350.00	In Trans	Speech Services	907--Special Education
3/18/2024	2/29/2024	B-268487916	3109--New Modern Music School US Inc.	5880--Instructional Vends EFT	100198	1,511.50	1,511.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/4/2024	B-268506737	3052--Art Steps, Inc.	5880--Instructional Vends EFT	100222	1,436.25	1,436.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481699	v3002--Breakthrough Sports LLC	5880--Instructional Vends EFT	100254	1,435.89	1,288.39	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			v3002--Breakthrough Sports LLC	5880--Instructional Vends EFT	100254	1,435.89	147.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506951	1874--South County Dance Inc.	5880--Instructional Vends EFT	100334	1,397.50	1,397.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506975	1389--Waterworks Aquatics Irvine	5880--Instructional Vends EFT	100220	1,351.34	294.16	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	2/28/2024	B-268488044	1389--Waterworks Aquatics Irvine	5880--Instructional Vends EFT	100220	1,351.34	1,057.18	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	637201327	6015--Granite Telecommunications	5910--Telephone EFT	100284	1,351.11	513.42	In Transit	912--Administration/Office	2073--Excel Academy Charter School - Helendale
			6015--Granite Telecommunications	5910--Telephone EFT	100284	1,351.11	837.69	In Transit	912--Administration/Office	2053--Excel Academy Charter School - Warner
3/18/2024	2/24/2024	B-268487976	v3084--Rockstars of Tomorrow Riverside	5880--Instructional Vends EFT	100208	1,275.50	1,275.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506769	6023--Celebration Education	5880--Instructional Vends EFT	100262	1,120.00	1,120.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/4/2024	B-268506946	5548--Sektor Jiu-Jitsu	5880--Instructional Vends EFT	100325	1,111.00	481.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			5548--Sektor Jiu-Jitsu	5880--Instructional Vends EFT	100325	1,111.00	630.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/26/2024	B-268482025	1550--Monica D Basurto	5880--Instructional Vends EFT	100342	1,080.00	84.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			1550--Monica D Basurto	5880--Instructional Vends EFT	100342	1,080.00	996.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	1/9/2024	4427	5556--Small Talk OC	5100--SpEd Consultants EFT	100224	1,080.00	1,080.00	In Trans	Speech Services	907--Special Education
3/18/2024	2/28/2024	B-268481733	1376--EMH Sports USA, Inc.	5880--Instructional Vends EFT	100188	1,072.00	762.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			1376--EMH Sports USA, Inc.	5880--Instructional Vends EFT	100188	1,072.00	310.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/26/2024	B-268481984	5495--Little School of Music	5880--Instructional Vends EFT	100236	1,052.50	1,052.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/5/2024	B-268506821	5711--Icetown Riverside	5880--Instructional Vends EFT	100268	983.50	119.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			5711--Icetown Riverside	5880--Instructional Vends EFT	100268	983.50	864.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/27/2024	B-268488041	1387--Waterworks Aquatics HB	5880--Instructional Vends EFT	100296	977.36	977.36	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/18/2024	3/4/2024	B-268506802	5822--Felton Ninja Academy	5880--Instructional Vends EFT	100259	954.50	954.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	9957822341	5421--Verizon Wireless 5421--Verizon Wireless	5910--Telephone EFT 5910--Telephone EFT	100217 100217	926.92 926.92	574.69 352.23	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/29/2024	B-268481657	6124--Applause Music Academy Glendora 6124--Applause Music Academy Glendora	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100225 100225	926.00 926.00	410.00 516.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024 3/1/2024	03012024-001-B 03012024-001	5110--Code WizardsHQ 5110--Code WizardsHQ	4100--Textbooks & Core (EFT 4100--Textbooks & Core (EFT	100242 100242	894.00 894.00	447.00 447.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
3/18/2024	2/20/2024	140-INV6176	5368--School Pathways, LLC 5368--School Pathways, LLC	9330--Prepaid Expenses EFT 9330--Prepaid Expenses EFT	100210 100210	7,650.00 7,650.00	4,743.00 2,907.00	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/22/2024	7618738	6333--Lexia Learning Systems LLC 6333--Lexia Learning Systems LLC	4101--Textbooks & Core (EFT 4101--Textbooks & Core (EFT	100193 100193	7,060.00 7,060.00	4,377.20 2,682.80	In Transit In Transit	908--Intervention/Title I 908--Intervention/Title I	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506905	4137--Olive Tree Education 4137--Olive Tree Education	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100189 100189	6,547.84 6,547.84	1,369.09 5,178.75	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/29/2024	B-268487988	1027--Science-2-U 1027--Science-2-U	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100313 100313	3,923.75 3,923.75	3,459.25 464.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	3/5/2024	B-268506913	2372--Outschool 2372--Outschool	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100267 100267	3,234.00 3,234.00	1,157.00 2,077.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/20/2024	2024-0089	5662--Beehively 5662--Beehively	5940--Technology Service EFT 5940--Technology Service EFT	100227 100227	3,000.00 3,000.00	1,140.00 1,860.00	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/18/2024	3/5/2024	B-268506840	2337--Wildcats Hockey LLC 2337--Wildcats Hockey LLC	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100247 100247	2,898.75 2,898.75	688.75 2,210.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	3/7/2024	1AEBE2B0	6334--Kidspace Children's Museum 6334--Kidspace Children's Museum 6334--Kidspace Children's Museum	9388--Parent PayPal Acco EFT 5835--Field Trips EFT 5835--Field Trips EFT	100286 100286 100286	1,232.00 1,232.00 1,232.00	742.00 308.00 182.00	In Transit In Transit In Transit	000--Schoolwide - Revenues/BS 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/18/2024	3/2/2024 3/9/2024	00002E01V5094 1649--UPS 00002E01V5104 1649--UPS	5930--Postage 5930--Postage 5930--Postage 5930--Postage	EFT EFT EFT EFT	100349 100349 100349 100349	355.62 355.62 355.62 355.62	109.28 66.98 111.20 68.16	In Transit In Transit In Transit In Transit	912--Administration/Office 912--Administration/Office 912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/29/2024	B-268487808	2877--Nataly Jewel	5880--Instructional Vends EFT	20136004352	189.59	189.59	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268488034	5581--Victory Aquatics	5880--Instructional Vends EFT	20136004320	180.00	180.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	B-268487972	3310--Rockside Music Inc	5880--Instructional Vends EFT	20136004286	180.00	180.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506800	5579--Evolution Swim Academy Rancho Missic	5880--Instructional Vends EFT	20136004302	158.00	158.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	B-268481861	5840--Homegrown Garden Skills	5880--Instructional Vends EFT	20136004279	150.00	150.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/5/2024	B-268506867	6176--Mamute Jiu Jitsu	5880--Instructional Vends EFT	20136004323	145.00	145.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481862	6270--Jennifer Gentile	5880--Instructional Vends EFT	20136004355	140.00	140.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/3/2024	B-268506750	2149--Bionerds	5880--Instructional Vends EFT	20136004288	132.00	132.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/2/2024	B-268506740	1061--Art With Aunt Jes	5880--Instructional Vends EFT	20136004334	126.00	126.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/28/2024	B-268481706	2391--Christian Classical Conservatory LLC	5880--Instructional Vends EFT	20136004292	105.56	105.56	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/23/2024	B-268481985	4109--Maria's Learning Shop	5880--Instructional Vends EFT	20136004360	100.00	100.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/4/2024	B-268506992	3212--WriteAtHome, Inc.	5880--Instructional Vends EFT	20136004300	99.00	99.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/3/2024	B-268506786	5520--Creative Academy Tutoring Center	5880--Instructional Vends EFT	20136004339	80.00	80.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481655	5693--Agape Dance Lab	5880--Instructional Vends EFT	20136004351	80.00	80.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/26/2024	B-268481855	5984--Healthy Footprints Adventure Communi	5880--Instructional Vends EFT	20136004307	72.00	72.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/5/2024	B-268506959	2738--Veronica Gutierrez	5880--Instructional Vends EFT	20136004338	67.50	67.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268487990	2880--Signing the Gap	5880--Instructional Vends EFT	20136004349	63.00	63.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/16/2024	1918	5443--Well-Trained Mind Academy, Inc.	4100--Textbooks & Core (EFT	20136004381	60.00	60.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268488005	1540--Stagelight Performing Arts	5880--Instructional Vends EFT	20136004328	30.00	30.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506838	1954--Joyful Music and Arts	5880--Instructional Vends EFT	20136004329	480.00	480.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506848	3301--Karen J Smith	5880--Instructional Vends EFT	20136004346	480.00	480.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/26/2024	B-268482011	6287--Mathnasium of Diamond Bar	5880--Instructional Vends EFT	20136004311	463.50	463.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506852	4107--Shinja Kim	5880--Instructional Vends EFT	20136004321	440.00	440.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/18/2024	2/29/2024	B-268487945	2171--Grace E. Hickok	5880--Instructional Vends EFT	20136004373	427.50	427.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268482015	5844--Miss Candice's Dance Center 5844--Miss Candice's Dance Center	5880--Instructional Vends EFT 5880--Instructional Vends EFT	20136004362 20136004362	405.00 405.00	320.00 85.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/29/2024	B-268488004	4111--Spanish Time 123 4111--Spanish Time 123	5880--Instructional Vends EFT 5880--Instructional Vends EFT	20136004353 20136004353	402.50 402.50	342.50 60.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481697	3329--Blue Buoy Swim School	5880--Instructional Vends EFT	20136004356	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/27/2024	B-268481943	1873--Krav Maga of Orange County	5880--Instructional Vends EFT	20136004285	396.97	396.97	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	1/29/2024	B-268487806	3308--My Learning Studio	5880--Instructional Vends EFT	20136004342	392.00	392.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506940	2381--Robin Nesom Young	5880--Instructional Vends EFT	20136004287	385.00	385.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/23/2024	B-268488014	6234--Sundae Music Group LLC	5880--Instructional Vends EFT	20136004310	360.00	360.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/5/2024	B-268506970	2798--Traditional Equitation School	5880--Instructional Vends EFT	20136004296	352.00	352.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/27/2024	B-268487933	1937--Play Your Part, Inc.	5880--Instructional Vends EFT	20136004291	350.00	350.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481701	1126--Buzzy Mae Music Academy	5880--Instructional Vends EFT	20136004361	343.75	343.75	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/27/2024	B-268481929	6069--KL Tutoring	5880--Instructional Vends EFT	20136004298	340.50	340.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/27/2024	B-268481978	5484--Learning with Laurel	5880--Instructional Vends EFT	20136004379	333.75	333.75	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/14/2024	KO2024021406	3042--MEL Science US	4100--Textbooks & Core t EFT	20136004293	328.39	328.39	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506814	5481--Freedom in Motion Gym, LLC	5880--Instructional Vends EFT	20136004363	317.00	317.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	B-268481992	5521--Mathnasium of Anaheim Hills	5880--Instructional Vends EFT	20136004327	299.00	299.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268481852	2177--Greenwave Surf	5880--Instructional Vends EFT	20136004294	280.00	280.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/2/2024	B-268506968	3086--Torres Fine Arts Instruction	5880--Instructional Vends EFT	20136004344	275.00	275.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/28/2024	B-268487925	1415--Hong Liang	5880--Instructional Vends EFT	20136004280	270.00	270.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	B-268481726	v3012--Do Re Michelle Music School	5880--Instructional Vends EFT	20136004312	240.00	240.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/2/2024	B-268506925	2147--Rebecca Meta Scott	5880--Instructional Vends EFT	20136004297	221.25	221.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268506685	3330--American Tiger Martial Arts & Fitness	5880--Instructional Vends EFT	20136004318	219.00	219.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/24/2024	B-268487928	2132--Piano Studio of Natalie Warren	5880--Instructional Vends EFT	20136004282	202.00	202.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	B-268487824	4182--NEWSONG Studio	5880--Instructional Vends EFT	20136004326	200.00	200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/25/2024	B-268481675	6150--Art Studio Pillar	5880--Instructional Vends EFT	20136004284	200.00	200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/1/2024	B-268487978	2315--Roos Music	5880--Instructional Vends EFT	20136004374	195.00	195.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/28/2024	B-268487979	1926--Royce Gracie Jiu Jitsu Academy	5880--Instructional Vends EFT	20136004335	981.00	981.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/13/2024	BI0033459	1295--BookShark, LLC	4100--Textbooks & Core t EFT	20136004303	976.17	352.25	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	2/19/2024	BI0033586	1295--BookShark, LLC	4100--Textbooks & Core t EFT	20136004303	976.17	178.05	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			1295--BookShark, LLC	4310--Materials & Supplie EFT	20136004303	976.17	76.34	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/25/2023	BI0027476	1295--BookShark, LLC	4100--Textbooks & Core t EFT	20136004303	976.17	369.53	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/4/2024	B-268506878	5680--Mathnasium of Torrance	5880--Instructional Vends EFT	20136004295	940.00	940.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	2/29/2024	B-268481865	1988--Joe Ferrante Music Academy	5880--Instructional Vends EFT	20136004324	936.00	936.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506801	1789--Fashion Camp - Create. Design. Sew. L. 1789--Fashion Camp - Create. Design. Sew. L.	5880--Instructional Vends EFT 5880--Instructional Vends EFT	20136004368 20136004368	904.55 904.55	551.25 353.30	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/25/2024	B-268487950	2769--Preston's Piano Studio	5880--Instructional Vends EFT	20136004382	888.00	888.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/2/2024	B-268506828	2047--Jennifer Walton	5880--Instructional Vends EFT	20136004359	860.00	860.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506996	4127--Meena Yoon	5880--Instructional Vends EFT	20136004365	850.00	850.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/26/2024	B-268487795	3305--Music Maker Inc.	5880--Instructional Vends EFT	20136004309	826.00	826.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	3/3/2024	B-268506974	5877--Ultra Jiu Jitsu Academy 5877--Ultra Jiu Jitsu Academy	5880--Instructional Vends EFT 5880--Instructional Vends EFT	20136004306 20136004306	815.00 815.00	495.00 320.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/18/2024	2/29/2024	B-268487800	4162--Reiko Israel	5880--Instructional Vends EFT	20136004366	792.00	792.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/1/2024	B-268506903	5545--Oksana Kalinuka dba OC Dancing	5880--Instructional Vends EFT	20136004383	780.00	780.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/18/2024	3/2/2024	B-268506683	2577--Amanda Leigh Holiday	5880--Instructional Vends EFT	20136004305	774.75	774.75	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/18/2024	2/27/2024	B-268481712	2017--Claremont Community School of Music 2017--Claremont Community School of Music	5880--Instructional Vends EFT 5880--Instructional Vends EFT	20136004345 20136004345	728.50 728.50	376.00 352.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

Table with columns for date, item ID, description, category, amount, and status. Includes various items like 16W3-HPTY-71D, 1GDD-KTTV-77P, etc., categorized under Textbooks & Core, Materials & Supply, and Instructional Funds.

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/18/2024	2/27/2024	B-268487907	v3076--Cristina E. O'Connell v3076--Cristina E. O'Connell	5880--Instructional Vends EFT 5880--Instructional Vends EFT	20136004290 20136004290	1,055.00 1,055.00	870.00 185.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/18/2024	2/26/2024	B-268487957	6202--Reign Equine Riding 6202--Reign Equine Riding	5880--Instructional Vends EFT 5880--Instructional Vends EFT	20136004316 20136004316	985.00 985.00	900.00 85.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/25/2024	2/26/2024	6.873E+13	5601--Atkinson, Andelson, Loya, Ruud & Romo 5601--Atkinson, Andelson, Loya, Ruud & Romo	5895--Professional Developm EFT 5895--Professional Developm EFT	100406 100406	219.00 219.00	135.78 83.22	In Transit In Transit	901--Human Resources 901--Human Resources	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/25/2024	2/24/2024 2/24/2024	4517330 4517328	1156--Barnes and Noble 1156--Barnes and Noble	4310--Materials & Supplies EFT 4310--Materials & Supplies EFT	100397 100397	209.61 209.61	116.55 93.06	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
3/25/2024	2/26/2024	5673	5051--Outside the Box Creations LLC	4100--Textbooks & Core Materials EFT	100389	160.35	160.35	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	2/26/2024 2/26/2024	IN-6291 IN-6290	1339--Elemental Science (Elemental Science, 1339--Elemental Science (Elemental Science,	4100--Textbooks & Core Materials EFT 4100--Textbooks & Core Materials EFT	100394 100394	138.09 138.09	49.00 89.09	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
3/25/2024	3/6/2024	B-268527276	v3089--B & B Music School	5880--Instructional Vends EFT	100401	130.00	130.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/11/2024	B-268527282	6313--Barnyard Buddies LLC	5880--Instructional Vends EFT	100381	110.00	110.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	2/24/2024	E014	3213--Wonder Crate	4100--Textbooks & Core Materials EFT	100370	109.90	109.90	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/8/2024	INV-03998-A	5776--Albourn Translation Service 5776--Albourn Translation Service	5800--Professional Services EFT 5800--Professional Services EFT	100365 100365	100.00 100.00	62.00 38.00	In Transit In Transit	908--Intervention/Title I 908--Intervention/Title I	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/25/2024	2/29/2024	1668	v3055--Green Kid Crafts	4100--Textbooks & Core Materials EFT	100393	98.49	98.49	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	2/26/2024	2301	v3105--eat2explore, Inc.	4100--Textbooks & Core Materials EFT	100379	87.45	87.45	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	2/29/2024	2054091	6033--Jones School Supply Inc. 6033--Jones School Supply Inc.	4310--Materials & Supplies EFT 4310--Materials & Supplies EFT	100398 100398	70.00 70.00	43.40 26.60	In Transit In Transit	906--Education Services 906--Education Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/25/2024	2/21/2024	570463	1179--Home Science Tools	4310--Materials & Supplies EFT	100367	61.81	61.81	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/6/2024	B-268527376	6276--Sprout and Blossom	5880--Instructional Vends EFT	100358	40.00	40.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	2/24/2024	19194	1243--JackRise Publishing, LLC	4100--Textbooks & Core Materials EFT	100360	27.99	27.99	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	3/6/2024	B-268527381	2267--Top Billing Entertainment Performance	5880--Instructional Vends EFT	100412	13.00	13.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	2/26/2024 2/21/2024	1190595852 1190596542	2056--LEGO Education 2056--LEGO Education	4310--Materials & Supplies EFT 4310--Materials & Supplies EFT	100361 100361	764.87 764.87	420.12 344.75	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
3/25/2024	3/12/2024	INV49714	5313--LogiCopy 5313--LogiCopy	5800--Professional Services EFT 5800--Professional Services EFT	100382 100382	578.41 578.41	358.61 219.80	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/25/2024	2/14/2024 2/22/2024 2/29/2024 2/27/2024	S306637 S307544 S308219 S308000	1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc	4100--Textbooks & Core Materials EFT 4100--Textbooks & Core Materials EFT 4100--Textbooks & Core Materials EFT 4100--Textbooks & Core Materials EFT	100410 100410 100410 100410	533.92 533.92 533.92 533.92	211.28 85.00 45.88 191.76	In Transit In Transit In Transit In Transit	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
3/25/2024	2/26/2024 2/26/2024	268438138 268461566	5469--Let's Bake Baking Kits 5469--Let's Bake Baking Kits	4100--Textbooks & Core Materials EFT 4100--Textbooks & Core Materials EFT	100407 100407	426.59 426.59	172.36 254.23	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
3/25/2024	3/6/2024	B-268527292	1110--Claremont Chefs Academy	5880--Instructional Vends EFT	100387	420.00	420.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	3/5/2024	B-268527304	5999--Gracie Barra RSM	5880--Instructional Vends EFT	100354	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/9/2024	B-268527283	6118--Bridges Equestrian, Inc.	5880--Instructional Vends EFT	100376	400.00	400.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	3/7/2024	B-268527393	5764--West Coast Krav Maga Wildomar, Inc.	5880--Instructional Vends EFT	100372	378.00	378.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/7/2024	B-268527392	2341--West Coast Krav Maga Temecula	5880--Instructional Vends EFT	100359	359.10	359.10	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/12/2024	B-268527398	5577--Mission Viejo Family YMCA	5880--Instructional Vends EFT	100364	350.00	350.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/6/2024	B-268527370	1902--Precision Gymnastics 1902--Precision Gymnastics	5880--Instructional Vends EFT 5880--Instructional Vends EFT	100404 100404	332.00 332.00	116.00 216.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/25/2024	3/7/2024	B-268527388	4147--Kelsey Mira Slater	5880--Instructional Vends EFT	100371	320.00	320.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/11/2024	B-268527308	6128--Institute for Educational Advancement	5880--Instructional Vends EFT	100392	315.00	315.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	3/7/2024	B-268527366	3142--Melinda J. Beebe	5880--Instructional Vends EFT	100366	315.00	315.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/8/2024	B-268527274	1994--Art 4 Kids and Teens	5880--Instructional Vends EFT	100375	298.00	298.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	2/29/2024	2402	6310--Growing Healthy Children Therapy Serv	5100--SpEd Consultants & EFT	100356	296.31	296.31	In Transit	907--Special Education	2073--Excel Academy Charter School - Helendale
3/25/2024	2/27/2024	10864	5310--Lit League	4100--Textbooks & Core Materials EFT	100408	287.60	287.60	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	2/27/2024 2/26/2024	233680 44778	3031--Essentials in Writing 3031--Essentials in Writing	4100--Textbooks & Core Materials EFT 4100--Textbooks & Core Materials EFT	100409 100409	273.75 273.75	128.40 145.35	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
3/25/2024	2/21/2024	2.50838E+11	2114--Lakeshore Learning Materials	4310--Materials & Supplies EFT	100405	269.99	269.99	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/25/2024	2/29/2024	502868	2129--Studies Weekly	4100--Textbooks & Core t	100362	263.27	87.49	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	2/28/2024	502794	2129--Studies Weekly	4100--Textbooks & Core t	100362	263.27	87.89	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	2/28/2024	502793	2129--Studies Weekly	4100--Textbooks & Core t	100362	263.27	87.89	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	2/1/2024	2104	6257--First Touch Soccer	5880--Instructional Vend	100402	260.00	260.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/6/2024	B-268527307	5711--Icetown Riverside	5880--Instructional Vend	100377	244.00	244.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/7/2024	B-268527383	2211--Valerie Marich Music	5880--Instructional Vend	100386	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	2/27/2024	920140	5016--All About Learning Press, Inc	4100--Textbooks & Core t	100355	232.60	232.60	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	1/4/2024	L231019036	5108--CliftonLarsonAllen LLP	5820--Audit & CPA	100353	13,434.75	8,329.54	In Transit	909--Business Services	2053--Excel Academy Charter School - Warner
			5108--CliftonLarsonAllen LLP	5820--Audit & CPA	100353	13,434.75	5,105.21	In Transit	909--Business Services	2073--Excel Academy Charter School - Helendale
3/25/2024	2/23/2024	1629	6332--Possip Inc	9330--Prepaid Expenses	100363	8,980.00	5,567.60	In Transit	914--Community Engagement	2053--Excel Academy Charter School - Warner
			6332--Possip Inc	9330--Prepaid Expenses	100363	8,980.00	3,412.40	In Transit	914--Community Engagement	2073--Excel Academy Charter School - Helendale
3/25/2024	3/6/2024	B-268527380	1071--Terra Arts Foundation	5880--Instructional Vend	100357	6,985.00	1,600.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			1071--Terra Arts Foundation	5880--Instructional Vend	100357	6,985.00	5,385.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	2/29/2024	B-268481871	3278--Jobbilo, LLC	5880--Instructional Vend	100391	6,634.92	2,758.25	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			3278--Jobbilo, LLC	5880--Instructional Vend	100391	6,634.92	3,876.67	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/6/2024	B-268527290	2749--Circle City School Enrichment Program	5880--Instructional Vend	100374	5,200.00	5,200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/12/2024	B-268527368	6094--POM Tutors	5880--Instructional Vend	100395	2,457.00	2,457.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/1/2024	1734	5809--Charter Connect	5841--Community Market	100368	1,950.00	1,209.00	In Transit	913--Marketing	2053--Excel Academy Charter School - Warner
			5809--Charter Connect	5841--Community Market	100368	1,950.00	741.00	In Transit	913--Marketing	2073--Excel Academy Charter School - Helendale
3/25/2024	3/12/2024	3036377.01	5106--City of Brea	5610--Facility Rents & Lev	100378	1,400.00	868.00	In Transit	914--Community Engagement	2053--Excel Academy Charter School - Warner
			5106--City of Brea	5610--Facility Rents & Lev	100378	1,400.00	532.00	In Transit	914--Community Engagement	2073--Excel Academy Charter School - Helendale
3/25/2024	3/1/2024	B-268506962	6321--The Red Apple Project	5880--Instructional Vend	100385	1,321.25	1,321.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/11/2024	B-268527303	2174--Gracie Barra Corona	5880--Instructional Vend	100396	1,284.00	1,284.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/8/2024	B-268527396	2255--Yamaha Music School Cerritos/Chino HI	5880--Instructional Vend	100352	1,157.00	224.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			2255--Yamaha Music School Cerritos/Chino HI	5880--Instructional Vend	100352	1,157.00	933.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	3/6/2024	B-268527298	6239--Golden Star Educational Services	5880--Instructional Vend	100403	1,100.00	1,100.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	1/12/2024	56240118	1290--Scholastic Inc.	4310--Materials & Supplie	100388	1,084.57	1,084.57	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	2/26/2024	SINV8955	3210--Bright Thinker	4100--Textbooks & Core t	100400	1,071.69	119.08	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	2/26/2024	SINV8944	3210--Bright Thinker	4100--Textbooks & Core t	100400	1,071.69	476.30	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	2/27/2024	SINV8970	3210--Bright Thinker	4100--Textbooks & Core t	100400	1,071.69	238.15	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	2/27/2024	SINV8990	3210--Bright Thinker	4100--Textbooks & Core t	100400	1,071.69	119.08	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	2/26/2024	SINV8962	3210--Bright Thinker	4100--Textbooks & Core t	100400	1,071.69	119.08	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/12/2024	B-268527293	5970--Code Ninjas Irvine	5880--Instructional Vend	100384	996.00	996.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	1/31/2024	EXCL02-0124	5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants t	100369	860.31	315.00	In Transselling Services	907--Special Education	2053--Excel Academy Charter School - Warner
			5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants t	100369	860.31	295.31	In Trans OT Services	907--Special Education	2053--Excel Academy Charter School - Warner
			5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants t	100369	860.31	250.00	In Transspeech Services	907--Special Education	2053--Excel Academy Charter School - Warner
3/25/2024	3/6/2024	B-268527379	6182--Sweetwater Farms	5880--Instructional Vend	100383	805.00	805.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/6/2024	B-268527295	1949--Kids Art Pasadena	5880--Instructional Vend	100390	804.00	804.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	2/26/2024	654050	2536--TalkBox.Mom	4100--Textbooks & Core t	100373	802.58	802.58	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/25/2024	3/6/2024	B-268527399	2309--Zak Barnett Studios	5880--Instructional Vend	100411	798.00	798.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/25/2024	2/25/2024	5121-032424	5121--Cox Business	5910--Telephone	100399	232.97	144.44	In Transit	912--Administration/Office	2053--Excel Academy Charter School - Warner
			5121--Cox Business	5910--Telephone	100399	232.97	88.53	In Transit	912--Administration/Office	2073--Excel Academy Charter School - Helendale
3/25/2024	3/16/2024	00002E01V5114	1649--UPS	5930--Postage	100380	226.32	140.32	In Transit	912--Administration/Office	2053--Excel Academy Charter School - Warner
			1649--UPS	5930--Postage	100380	226.32	86.00	In Transit	912--Administration/Office	2073--Excel Academy Charter School - Helendale
3/26/2024	3/7/2024	B-268527288	6122--Christina O'Herin	5880--Instructional Vend	20136004399	225.00	225.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/26/2024	3/7/2024	B-268527364	5492--Mathnasium of Ladera Ranch	5880--Instructional Vend	20136004404	225.00	225.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/26/2024	3/7/2024	B-268527377	3012--Stars Gymnastics LLC	5880--Instructional Vend	20136004401	221.00	221.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/26/2024	3/6/2024	B-268527299	5924--Goldfish Swim School of Aliso Viejo	5880--Instructional Vend	20136004390	149.00	149.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/26/2024	2/26/2024	1111370	1148--Institute for Excellence in Writing	4100--Textbooks & Core t	20136004388	148.92	148.92	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/26/2024	3/10/2024	B-268527305	1399--Gryphon Fitness Studio	5880--Instructional Vend	20136004389	140.00	140.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/26/2024	2/27/2024	INV2301175	1195--Peace Hill Press, Inc. dba Well Trained I	4100--Textbooks & Core t	20136004405	38.95	38.95	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/26/2024	3/7/2024	B-268527362	4186--Kidz Golf Club	5880--Instructional Vend	20136004400	480.00	480.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

	2/28/2024	660293	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core (EFT	20136004394	2,165.96	126.12	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	2/28/2024	663237	1201--Rainbow Resource Center, Inc	4310--Materials & Supplie EFT	20136004394	2,165.96	221.51	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	2/27/2024	660306	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core (EFT	20136004394	2,165.96	34.98	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/19/2024	631802	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core (EFT	20136004394	2,165.96	79.14	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/19/2024	626793	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core (EFT	20136004394	2,165.96	142.45	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			1201--Rainbow Resource Center, Inc	4310--Materials & Supplie EFT	20136004394	2,165.96	68.42	In Transit	906--Education Services	2053--Excel Academy Charter School - Warner
			1201--Rainbow Resource Center, Inc	4310--Materials & Supplie EFT	20136004394	2,165.96	41.94	In Transit	906--Education Services	2073--Excel Academy Charter School - Helendale
3/26/2024	3/6/2024	B-268527382	2101--Automotive Technology Group, Inc. dbi	5880--Instructional Vendc EFT	20136004396	2,000.00	1,600.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
			2101--Automotive Technology Group, Inc. dbi	5880--Instructional Vendc EFT	20136004396	2,000.00	400.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
3/26/2024	3/6/2024	B-268527375	2583--Spanish Advantage	5880--Instructional Vendc EFT	20136004387	1,196.25	683.75	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
			2583--Spanish Advantage	5880--Instructional Vendc EFT	20136004387	1,196.25	512.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/26/2024	3/8/2024	B-268527367	1377--Olympia Training Center	5880--Instructional Vendc EFT	20136004395	1,131.00	1,131.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/26/2024	3/12/2024	B-268527385	5875--Valley Wide Elite Gymnastics	5880--Instructional Vendc EFT	20136004402	912.00	912.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
3/27/2024	3/27/2024	5367-032724	5367--San Bernardino Superintendent Of Sch	9525--STRS	Printed Chei 30106	81,427.32	81,427.32	In Transit	000--Schoolwide -Revenues/BS	2073--Excel Academy Charter School - Helendale
Total for CHASE 9313						#####	643,700.71			

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

Table with columns for date, item ID, description, category, and amount. The table lists 400 items, each with a corresponding date, item ID, description, category, and amount. The categories include 'Amazon Capital Services, Inc.', 'Materials & Supplies', and 'Textbooks & Core Curricu'. The amounts range from approximately 1.18 to 132.20.

Table with columns for school year, school name, and principal name. The table lists 400 rows, each representing a school and its principal. The school years range from 2023 to 2025, and the principal names include 'Warner', 'Helmsdale', and 'Waller'.

Table with columns: Date, Description, Budget, Actual, Variance, and Account. Contains a large list of transactions for various departments and services.

Table with columns: Date, Description, Budget, Actual, Variance, and Account. Contains a large list of transactions for various departments and services.

Table with columns: Date, Description, Budget, Actual, Variance, and Account. Contains a large list of transactions for various departments and services.

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

3/8/2024	1XRK-KJDT-77FL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	25.11	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/13/2024	1JAE-MMRP-1LKD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	38.99	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/8/2024	16DQ-V317-919Q	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	6.01	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Hekendale
3/14/2024	163G-GDCD-9D9G	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	209.86	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
2/29/2024	1MPF-4GCL-6PM6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	20.04	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
12/3/2023	1WMM-16VK-KXV1	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFF	20136004538	25,504.95	34.75	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1WMB-B83H-11YX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	38.99	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/7/2024	1M67-C70M-47L1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	32.19	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/14/2024	18F0-4VKD-63RC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	154.18	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1258-4Q9K-671T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	127.88	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/14/2024	1G4E-6H3K-6XYX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	91.25	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	19M9-Y7XV-4LL7	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFF	20136004538	25,504.95	40.58	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/13/2024	1DPW-DGPI-379V	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	138.10	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1X01-FJ8H-WHT7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	82.88	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/7/2024	1DD0-R9M0-66GQ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	20.80	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1QLY-C77G-VJCC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	144.22	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1D2W-G21H-4XZK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	182.85	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/8/2024	1Y1K-TW6F-6MCC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	47.28	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/14/2024	1VM7-WMXP-6HW9	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFF	20136004538	25,504.95	17.98	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1D9W-W1D0-31DZ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFF	20136004538	25,504.95	15.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/4/2024	1M07-Y338-41W8	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	60.78	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/8/2024	1C79-YHWC-77JF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	8.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1M9F-Y7XV-1XP8	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	25.04	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
2/29/2024	1V29-X1C3-93PY	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	66.61	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/10/2024	1T24-L9X9-4J8F	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	7.53	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/11/2024	1Y74-LGJ4-R4XQ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	30.67	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/5/2024	1VMH-KCYH-11TC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	49.80	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	11M6-C2M9-C2N6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	259.90	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/10/2024	1CTV-HCLL-M6YX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	258.28	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1RTI-QWCF-034G	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	161.56	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/14/2024	1W4E-GJ1J-F94C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	44.25	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/14/2024	1JPA-KDWP-D91L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	127.77	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/8/2024	1T43-3Q1J-74YJ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFF	20136004538	25,504.95	64.44	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/8/2024	1X0V-F6H9-CQND	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	18.51	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/10/2024	1M2D-16H3-9WEC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	15.07	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/8/2024	1H2M-AMDC-7YCD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004538	25,504.95	16.73	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024										
3/6/2024	1GFC-LG3P-9Q3L	1925-Amazon Capital Services, Inc.	4320-Office Supplies	EFF	20136004493	16,604.90	133.29	In Transit	912-Administration/Office	2053-Excel Academy Charter School - Warner
3/6/2024	1VMH-KCYH-C7VK	1925-Amazon Capital Services, Inc.	5841-Community Marketing	EFF	20136004493	16,604.90	24.97	In Transit	914-Community Engagement	2053-Excel Academy Charter School - Warner
3/6/2024	1MF-6D7N-6N8Y	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	15.30	In Transit	914-Community Engagement	2053-Excel Academy Charter School - Warner
3/6/2024	1QMR-C1FV-CPM3	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	10.02	In Transit	906-Education Services	2053-Excel Academy Charter School - Warner
3/12/2024	1J8K-7H2J-58DQ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFF	20136004493	16,604.90	194.47	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/7/2024	1J7Z-DNCG-19MP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	48.22	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/10/2024	16F0-Y7XV-FV94	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	263.72	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/3/2024	1K04-CYWR-V64L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	122.72	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1DKA-CYWR-V6WY	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	91.43	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/5/2024	131I-W01K-4HXQ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	21.75	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/4/2024	1F3J-4X14-3GK4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	8.96	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1M4G-YJDF-LYK3	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	80.44	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1C2L-49PC-37D2	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	21.20	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/3/2024	1QLY-C77G-TKXG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	184.50	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/6/2024	1WCT-M97G-6MR8	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	11.42	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/5/2024	1H8C-VG67-7P9Y	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFF	20136004493	16,604.90	65.67	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/3/2024	1F8M-CTCF-RD9G	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	81.46	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/14/2024	1WTM-M8VH-Y34J	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	206.94	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/7/2024	1D9D-R9M0-39D0	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	12.46	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1M4B-R9M0-3T2J	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	21.75	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/4/2024	1KWC-6M6U-YJMT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	82.76	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/5/2024	17XV-K944-6CLR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	176.64	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/5/2024	1M2D-16H3-FQ4J	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	21.75	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/7/2024	1CTY-YHWC-414X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	19.70	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	16XG-M7K4-1XCR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	204.72	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1M9W-JYMW-CT79	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	70.49	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1K9H-JFXV-L3LH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	157.82	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
2/29/2024	1M4G-YJDF-4Z7H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	114.03	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	1W8C-F5R6-K2D4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	32.84	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/1/2024	13LR-KUWH-FY34	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	15.81	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/12/2024	148P-H7M-3T14	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	290.18	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1T1F-M3XK-5YWC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	26.86	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/5/2024	16M9-MXP8-6G31	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	8.98	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1M6N-CTCF-V7MG	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFF	20136004493	16,604.90	118.19	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1M4G-YJDF-LWMM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	333.53	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/2/2024	1K9H-JFXV-LM3X	1925-Amazon Capital Services, Inc.	4310-Textbooks & Core Curricu	EFF	20136004493	16,604.90	41.66	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
2/26/2024	1X0K-YM61-Ul9G	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	172.68	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/4/2024	1D2W-W1D0-Y29H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	18.26	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/5/2024	16TF-RP67-6VJD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	90.01	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/5/2024	1NDC-T168-493X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF	20136004493	16,604.90	99.89	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/4/2024	1QCC-T48R-493X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFF						

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

Meeting Date	Item Description	Account Name	Category	Status	Fiscal Year	Amount	Balance	Fund	Account Number
2/29/2024	1JLV-HBD7-47YX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	128.90	In Transit	910-Instructional Funds
2/29/2024	1T4L-640N-7017	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	33.00	In Transit	2053-Excel Academy Charter School - Warner
2/28/2024	1M1M-3316-711D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	46.67	In Transit	910-Instructional Funds
2/28/2024	1V1V-WL4N-3M24	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	297.52	In Transit	2073-Excel Academy Charter School - Warner
2/28/2024	13C2-MTR5-473X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	20,921.05	In Transit	910-Instructional Funds
3/5/2024	18M-J6NR-6M03	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004430	20,921.05	7.50	In Transit	910-Instructional Funds
2/29/2024	11X4-18R8-119Q	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	11.23	In Transit	2073-Excel Academy Charter School - Warner
2/28/2024	1YF4-C6RM-14YD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	17.15	In Transit	910-Instructional Funds
2/27/2024	1H1J-G6SH-7VL7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	187.06	In Transit	910-Instructional Funds
2/28/2024	1Y2D-9XST-M6E4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	39.00	In Transit	910-Instructional Funds
2/27/2024	1G6H-Q211-030X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	55.92	In Transit	910-Instructional Funds
2/27/2024	1W1G-724W-71E9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	5.93	In Transit	910-Instructional Funds
2/28/2024	1H1M-M16C-691D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	27.38	In Transit	910-Instructional Funds
2/26/2024	13F6-79WG-41YV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	43.39	In Transit	910-Instructional Funds
2/25/2024	1TRM-LVTF-7FVK	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004430	20,921.05	17.23	In Transit	910-Instructional Funds
2/29/2024	11R4-DSM6-6LCO	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	267.62	In Transit	910-Instructional Funds
2/29/2024	11XJ-1X8C-1P02	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	66.42	In Transit	910-Instructional Funds
2/27/2024	1W2D-9V3P-FV01	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004430	20,921.05	38.66	In Transit	910-Instructional Funds
2/28/2024	1C3J-TW1T-4YMO	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	173.00	In Transit	910-Instructional Funds
2/29/2024	1C9P-TWGI-394D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004430	20,921.05	92.01	In Transit	910-Instructional Funds
4/1/2024									
2/13/2024	12X4-097C-WVWF	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	46.49	In Transit	910-Instructional Funds
2/15/2024	16MW-LN6M-4VM6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	18.31	In Transit	906-Education Services
2/15/2024	1VH6-3GHW-J21H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	29.88	In Transit	906-Education Services
2/15/2024	11XJ-W93K-FRGG	1925-Amazon Capital Services, Inc.	4320-Office Supplies	EFT	20136004407	19,727.95	27.48	In Transit	914-Community Engagement
2/14/2024	11XW-RG9F-6YH9	1925-Amazon Capital Services, Inc.	4320-Office Supplies	EFT	20136004407	19,727.95	21.25	In Transit	912-Administration/Office
2/15/2024	16K6-V0DX-X1FM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	15.52	In Transit	914-Community Engagement
2/13/2024	1FCS-676D-R9HW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	13.79	In Transit	910-Instructional Funds
2/14/2024	1C6K-Q27J-721T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	11.95	In Transit	910-Instructional Funds
2/12/2024	1GFY-1C0A-RW47	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	139.85	In Transit	910-Instructional Funds
2/16/2024	1C7J-WN7C-7G63	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	43.98	In Transit	910-Instructional Funds
2/12/2024	1A6D-PHMM-RRV4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	18.31	In Transit	2053-Excel Academy Charter School - Warner
2/14/2024	1YKJ-J1H6-64RX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	118.60	In Transit	910-Instructional Funds
2/12/2024	1NM-VML3-1O0D	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	7.71	In Transit	910-Instructional Funds
2/15/2024	1IM4-P21W-46VP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	145.24	In Transit	910-Instructional Funds
2/15/2024	1T2C-1Y8B-D33X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	102.34	In Transit	910-Instructional Funds
2/12/2024	1A6D-PHMM-RRV9	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	14.00	In Transit	910-Instructional Funds
2/15/2024	1FCD-679H-7FD0	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	37.17	In Transit	910-Instructional Funds
2/14/2024	1D1M-YC21-CP1C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	23.11	In Transit	2053-Excel Academy Charter School - Warner
2/13/2024	1YL7-7417-RR7Q	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	22.98	In Transit	910-Instructional Funds
2/13/2024	114K-MRYG-X4DK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	214.12	In Transit	910-Instructional Funds
2/13/2024	148P-P1D7-LVL6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	101.71	In Transit	910-Instructional Funds
2/15/2024	1OQ3-CL66-30FN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	147.23	In Transit	910-Instructional Funds
2/12/2024	1VYG-RMTT-74RT	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	23.62	In Transit	910-Instructional Funds
2/16/2024	1YQJ-WMM6-7VCC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	17.78	In Transit	910-Instructional Funds
2/13/2024	11XJ-W93K-30AP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	34.48	In Transit	910-Instructional Funds
2/15/2024	1M1D-8M2H-9F4F	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	53.27	In Transit	910-Instructional Funds
2/13/2024	119K-OKD9-Y1EH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	54.94	In Transit	910-Instructional Funds
2/16/2024	1YQJ-WMM6-7V67	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	104.44	In Transit	910-Instructional Funds
2/14/2024	148P-H1R0-7N1J	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	69.25	In Transit	910-Instructional Funds
2/15/2024	1VX6-CPD9-4YFC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	12.92	In Transit	910-Instructional Funds
2/13/2024	1D7I-73PD-X996	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	26.79	In Transit	910-Instructional Funds
2/13/2024	1FCS-679J-1YLX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	49.97	In Transit	910-Instructional Funds
2/16/2024	161G-PHCD-6V09	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	21.68	In Transit	910-Instructional Funds
2/14/2024	1MTY-CDXP-J7XL	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	69.25	In Transit	910-Instructional Funds
2/16/2024	19KJ-3W6G-971X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	252.33	In Transit	910-Instructional Funds
2/12/2024	1GFY-1C0A-T61N	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	80.92	In Transit	910-Instructional Funds
2/16/2024	1VK6-CPD9-D739	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	10.62	In Transit	910-Instructional Funds
2/14/2024	14CM-DFK6-CM6P	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	68.94	In Transit	910-Instructional Funds
2/12/2024	1FM4-LY94-1617	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	191.60	In Transit	910-Instructional Funds
2/15/2024	1LMG-H89V-3WNY	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	33.39	In Transit	910-Instructional Funds
2/12/2024	1YL7-7417-G7EP	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	141.89	In Transit	910-Instructional Funds
2/12/2024	19XV-67QM-Y4MG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	38.88	In Transit	910-Instructional Funds
2/16/2024	1FH4-Y1EH-F11M	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	144.85	In Transit	910-Instructional Funds
2/14/2024	133K-0217-F8XW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	149.61	In Transit	910-Instructional Funds
2/13/2024	1GKJ-9VLX-VJ2D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	10.30	In Transit	910-Instructional Funds
2/15/2024	116G-3W6W-F6LD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	11.70	In Transit	910-Instructional Funds
2/13/2024	1XKJ-WMM6-Y1YV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	84.30	In Transit	910-Instructional Funds
2/15/2024	11WR-R89X-10KW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	91.97	In Transit	910-Instructional Funds
2/14/2024	1D4C-MMMV-991T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	95.93	In Transit	910-Instructional Funds
2/13/2024	16K6-V0DX-VN63	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	143.50	In Transit	910-Instructional Funds
2/13/2024	12KD-8W1D-66WD	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	19.01	In Transit	910-Instructional Funds
2/14/2024	1HMW-NW1J-732K	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	84.99	In Transit	910-Instructional Funds
2/12/2024	1VYG-RMTT-RV1T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	36.49	In Transit	910-Instructional Funds
2/14/2024	13XJ-O97C-92C9	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	28.28	In Transit	910-Instructional Funds
2/13/2024	13XJ-O97C-XLRT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	46.25	In Transit	910-Instructional Funds
2/13/2024	1FCT-4TTP-X3Y2	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	52.52	In Transit	910-Instructional Funds
2/16/2024	1H6J-4X7G-CW2D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	48.04	In Transit	910-Instructional Funds
2/16/2024	1Y1J-674M-79RC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	218.58	In Transit	910-Instructional Funds
2/15/2024	1F9W-WL4A-1HMV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	97.04	In Transit	910-Instructional Funds
2/13/2024	11TP-TR6K-VMCL	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	113.09	In Transit	910-Instructional Funds
2/12/2024	1W6L-F79H-WF7V	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004407	19,727.95	28.86	In Transit	910-Instructional Funds
2/13/2024	1D7I-74YD-YNAK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	82.71	In Transit	910-Instructional Funds
2/15/2024	1Y7K-1316-H91H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	91.51	In Transit	910-Instructional Funds
2/15/2024	1Y1W-Y1E4-799C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004407	19,727.95	124.82	In Transit	910-Instructional Funds
2/15/2024	118P-QNDT-CR1V	1925-Amazon Capital Services							

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

2/21/2024	YKL-K9W7-ZXR7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	13.04	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/16/2024	12FVW-2377-7183	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	26.63	8.78	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/22/2024	1X1H-KCVV-621W	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	20.46	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/21/2024	IDWV-R9FF-63NL	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600407	19,727.95	42.01	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/17/2024	1FH4-YNDH-92DN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	56.99	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/21/2024	1G9D-Y1WK-733M	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	80.28	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/16/2024	1FWD-127Y-VYFC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	9.78	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/23/2024	1HCV-CF3R-KD1C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	117.28	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/21/2024	1LF1-LRVY-702Y	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	14.01	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/21/2024	1M6W-KD3H-6641	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	59.33	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/22/2024	1Y1J-KM77-60GL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	59.56	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/21/2024	1Y1P-KY18-30RT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	29.90	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/21/2024	1LVJ-R311-73VW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	49.84	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/19/2024	1NGI-L319-OGON	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	238.95	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/22/2024	13WJ-G24J-41H8	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	22.77	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/16/2024	1YTW-RR13-D61P	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	25.68	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/23/2024	1J6V-YR8P-K6KH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	26.07	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/16/2024	13K7-Z9FF-DHFX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	32.76	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/19/2024	10G3-CL66-TJRY	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	57.10	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/22/2024	1W01-JM0H-DYMD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	17.47	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/21/2024	1W01-JM0H-431V	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	218.36	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/21/2024	1G9D-Y1WK-736C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	37.78	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/22/2024	1T2K-11KW-C38P	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	71.43	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/22/2024	1M6W-KD3H-620W	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	42.11	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/16/2024	1X0D-41V4-99MC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	57.82	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/16/2024	1CT7-VN2C-C14R	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	69.24	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/17/2024	100M-ZF7P-FY1N	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	103.96	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/20/2024	10FT-CP83-4NLE	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	227.27	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/13/2024	1XTJ-WWUD-WF63	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	523.26	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/16/2024	1T79-MPV8-CKRT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	6.51	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/19/2024	11T9-9L02-4H7T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	26.91	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/22/2024	1Y1C-1Y3H-CD9F	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	37.47	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/22/2024	1T6E-RD9H-C796	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600407	19,727.95	62.30	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
2/17/2024	1R7W-D1FL-H84C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600407	19,727.95	45.48	In Transit	906-Education Services	2053-Excel Academy Charter School - Warner	
4/8/2024	3/26/2024	B-268541034	2083--American Martial Arts Academy Fullerton	5880--Instructional Vendors &	EFT	100504	294.00	294.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/8/2024	3/26/2024	B-268541035	3330--American Tiger Martial Arts & Fitness	5880--Instructional Vendors &	EFT	20136004485	219.00	219.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	3/30/2024	B-268541040	6124--Applause Music Academy Glendora	5880--Instructional Vendors &	EFT	100488	820.00	328.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
			6124--Applause Music Academy Glendora	5880--Instructional Vendors &	EFT	100488	820.00	492.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	3/30/2024	B-268541043	6125--Applause Music Academy Rancho Cucam.	5880--Instructional Vendors &	EFT	100491	492.00	492.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/29/2024	4/1/2024	MAJ2017841	1151--Apple Inc	4310-Materials & Supplies	EFT	100764	2,031.83	405.17	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	4/1/2024	MAJ2017840	1151--Apple Inc	4310-Materials & Supplies	EFT	100764	2,031.83	408.16	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	4/1/2024	MAJ2017842	1151--Apple Inc	4310-Materials & Supplies	EFT	100764	2,031.83	408.16	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	4/1/2024	MAJ20011002	1151--Apple Inc	4310-Materials & Supplies	EFT	100764	2,031.83	405.17	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	4/1/2024	MAJ2017449	1151--Apple Inc	4310-Materials & Supplies	EFT	100764	2,031.83	405.17	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	3/14/2024	MA69080714	1151--Apple Inc	4310-Materials & Supplies	EFT	100594	410.41	410.41	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/8/2024	3/13/2024	MA6889751	1151--Apple Inc	4310-Materials & Supplies	EFT	100547	1,634.15	405.17	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	3/13/2024	MA68877423	1151--Apple Inc	4310-Materials & Supplies	EFT	100547	1,634.15	410.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	3/6/2024	MA67503399	1151--Apple Inc	4310-Materials & Supplies	EFT	100547	1,634.15	408.16	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	3/9/2024	MA68092420	1151--Apple Inc	4310-Materials & Supplies	EFT	100547	1,634.15	410.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	3/7/2024	MA67735031	1151--Apple Inc	4310-Materials & Supplies	EFT	100425	817.82	405.17	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	3/9/2024	MA68095770	1151--Apple Inc	4310-Materials & Supplies	EFT	100425	817.82	412.65	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/15/2024	4/4/2024	B-268552012	5864--Aquatic Explorations and Safety Training	5880--Instructional Vendors &	EFT	100635	459.00	351.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
			5864--Aquatic Explorations and Safety Training	5880--Instructional Vendors &	EFT	100635	459.00	108.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	3/28/2024	B-268541044	1370--Arbor Learning Community	5880--Instructional Vendors &	EFT	20136004460	1,745.00	960.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
			1370--Arbor Learning Community	5880--Instructional Vendors &	EFT	20136004460	1,745.00	785.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	4/9/2024	B-268552013	3126--Archery Champs	5880--Instructional Vendors &	EFT	20136004526	690.50	690.50	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/29/2024	3/25/2024	0238184-IN	5920--Arey Jones Educational Solutions	4320--Office Supplies	EFT	100793	1,773.29	673.85	In Transit	915-Technology	2073-Excel Academy Charter School - Helendale
			5920--Arey Jones Educational Solutions	4320--Office Supplies	EFT	100793	1,773.29	1,099.44	In Transit	915-Technology	2053-Excel Academy Charter School - Warner
4/1/2024	3/20/2024	B-268528665	5641--Ark Academy	5880--Instructional Vendors &	EFT	100436	2,000.00	565.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
			5641--Ark Academy	5880--Instructional Vendors &	EFT	100436	2,000.00	1,435.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/15/2024	4/2/2024	B-268545349	1994--Art 4 Kids and Teens	5880--Instructional Vendors &	EFT	100631	298.00	298.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541045	6254--Art of Ju Jitsu Costa Mesa	5880--Instructional Vendors &	EFT	20136004472	6,987.00	250.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
			6254--Art of Ju Jitsu Costa Mesa	5880--Instructional Vendors &	EFT	20136004472	6,987.00	6,737.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	3/19/2024	B-268533551	6254--Art of Ju Jitsu Costa Mesa	5880--Instructional Vendors &	EFT	20136004417	500.00	500.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	3/19/2024	INV2308411	1321--Art of Problem Solving	4100--Textbooks & Core Curricu	EFT	20136004510	140.10	140.10	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	3/15/2024	INV2308340	1321--Art of Problem Solving	4100--Textbooks & Core Curricu	EFT	20136004436	296.10	156.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
	2/26/2024	INV2308074	1321--Art of Problem Solving	4100--Textbooks & Core Curricu	EFT	20136004436	296.10	140.10	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/15/2024	4/1/2024	B-268545352	1849--Art Steps, Inc Yorba Linda	5880--Instructional Vendors &	EFT	100588	462.00	462.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268545355	3052--Art Steps, Inc.	5880--Instructional Vendors &	EFT	100563	1,709.00	1,709.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268545354	3015--Art Steps, Inc. Costa Mesa	5880--Instructional Vendors &	EFT	100592	212.00	212.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	3/27/2024	B-268541052	6150--Art Studio Pilar	5880--Instructional Vendors &	EFT	20136004468	300.00	300.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	4/5/2024	B-268552017	1061--Art With Aunt Jes	5880--Instructional Vendors &	EFT	20136004504	126.00	126.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/15/2024	4/1/2024	B-268541400	v3054--Ascent Institute for Youth Skills Develop	5880--Instructional Vendors &	EFT	20136004503	6,951.00	2,155.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
			v3054--Ascent Institute for Youth Skills Develop	5880--Instructional Vendors &	EFT	20136004503	6,951.00	4,796.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/22/2024	4/2/2024	B-268552332	2101--Automotive Technology Group, Inc. dba i	5880--Instructional Vendors &	EFT	20136004548	1,800.00	400.00	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
			2101--Automotive Technology Group, Inc. dba i	5880--Instructional Vendors &	EFT	20136004548	1,800.00	1,400.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	3/25/2024	B-268541053	1441--AVPA at La Sierra University	5880--Instructional Vendors &	EFT	20136004461	390.00	390.00	In Transit	910-Instructional Funds</	

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

4/23/2024	4/11/2024	B-26854189	5829--Broadway Gymnastics School	5880--Instructional Vendors &	EFT	20136004545	396.00	396.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/1/2024	B-26854365	2199--Burbank Music Academy	5880--Instructional Vendors &	EFT	100568	450.00	450.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/29/2024	B-268541062	1126--Buzzy Mae Music Academy 1126--Buzzy Mae Music Academy	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004435 20136004435	3,087.50 3,087.50	1,200.00 1,967.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541067	1355--C3 Classes, LLC	5880--Instructional Vendors &	EFT	100487	3,024.16	3,024.16	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/4/2024	B-268545366	5648--CA Training Facility 5648--CA Training Facility	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004509 20136004509	1,160.00 1,160.00	910.00 250.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/1/2024	3/7/2024	B-268527285	5648--CA Training Facility	5880--Instructional Vendors &	EFT	20136004426	490.00	490.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/23/2024	4/10/2024	B-268552502	6353--CAD Class	5880--Instructional Vendors &	EFT	20136004564	399.99	399.99	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/4/2024	B-268545367	v3140--Cadenza Music Academy	5880--Instructional Vendors &	EFT	100638	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/5/2024	B-268552070	5684--Caique Jiu Jitsu Walnut Academy	5880--Instructional Vendors &	EFT	100627	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/1/2024	3/7/2024	B-268527286	5684--Caique Jiu Jitsu Walnut Academy	5880--Instructional Vendors &	EFT	100456	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/28/2024	B-268541069	1424--California Gymnastics, LLC 1424--California Gymnastics, LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100499 100499	205.00 205.00	95.00 110.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/1/2024	3/6/2024	B-268527287	1424--California Gymnastics, LLC 1424--California Gymnastics, LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100466 100466	205.00 205.00	95.00 110.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541070	2609--Candí Chavez	5880--Instructional Vendors &	EFT	100479	360.00	360.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/29/2024	3/19/2024	52506178 RI	2345--Carolina Biological Supply Company	4310--Materials & Supplies	EFT	100788	51.34	51.34	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/3/2024	100-29578-B	6221--Catalina Island Marine Institute 6221--Catalina Island Marine Institute	5835--Field Trips 5835--Field Trips	EFT EFT	100421 100421	5,785.00 5,785.00	2,069.75 3,715.25	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541075	6165--Catherine Croisette Ceib	5880--Instructional Vendors &	EFT	100537	200.00	200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541077	6023--Celebration Education	5880--Instructional Vendors &	EFT	100541	1,120.00	1,120.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268541404	1784--Celeste Haeueter	5880--Instructional Vendors &	EFT	20136004502	678.34	678.34	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/29/2024	4/2/2024	2168	6309--Champions Services Incorporated	5100--SpEd Consultants and Ven	EFT	100790	1,125.00	1,125.00	In Transit	APE Services	907--Special Education
4/15/2024	4/3/2024	B-268545483	6286--Chapman Hamborg Art Classes	5880--Instructional Vendors &	EFT	100579	265.00	265.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/1/2024	1742	5809--Charter Connect 5809--Charter Connect	5841--Community Marketing 5841--Community Marketing	EFT EFT	100636 100636	1,950.00 1,950.00	1,209.00 741.00	In Transit In Transit	913--Marketing 913--Marketing	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/22/2024	4/11/2024	B-268554199	1967--Cheryl Thomas	5880--Instructional Vendors &	EFT	100646	1,080.00	1,080.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/28/2024	B-268541082	1967--Cheryl Thomas	5880--Instructional Vendors &	EFT	100519	200.00	200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/29/2024	B-268541072	2391--Christian Classical Conservatory LLC	5880--Instructional Vendors &	EFT	20136004442	105.56	105.56	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/23/2024	4/2/2024	B-268552184	3401--Christina Choate	5880--Instructional Vendors &	EFT	20136004540	805.00	805.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/4/2024	B-268552076	6122--Christina O'Herin	5880--Instructional Vendors &	EFT	20136004511	300.00	300.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/7/2024	B-268552125	2749--Circle City School Enrichment Program	5880--Instructional Vendors &	EFT	100581	5,200.00	5,200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/12/2024	3038238.01	5106--City of Brea 5106--City of Brea	5610--Facility Rents & Leases 5610--Facility Rents & Leases	EFT EFT	100451 100451	1,986.00 1,986.00	754.68 1,231.32	In Transit In Transit	914--Community Engagement 914--Community Engagement	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/15/2024	4/8/2024	B-268552129	1110--Claremont Chefs Academy	5880--Instructional Vendors &	EFT	100593	525.00	525.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/25/2024	B-268541086	2017--Claremont Community School of Music 2017--Claremont Community School of Music	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004448 20136004448	658.00 658.00	282.00 376.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024	L241205874	5108--CliftonLarsonAllen LLP 5108--CliftonLarsonAllen LLP	5820--Audit & CPA 5820--Audit & CPA	EFT EFT	100672 100672	1,050.00 1,050.00	399.00 651.00	In Transit In Transit	909--Business Services 909--Business Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/8/2024	4/2/2024	L241191295	5108--CliftonLarsonAllen LLP 5108--CliftonLarsonAllen LLP	5820--Audit & CPA 5820--Audit & CPA	EFT EFT	100505 100505	2,625.00 2,625.00	997.50 1,627.50	In Transit In Transit	909--Business Services 909--Business Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/29/2024	4/2/2024	INV5386	1163--CM School Supply, Inc.	4310--Materials & Supplies	EFT	100760	41.63	41.63	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/5/2024	INV5152	1163--CM School Supply, Inc.	4310--Materials & Supplies	EFT	100467	42.95	42.95	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Helendale
4/22/2024	4/11/2024	B-268555842	5970--Code Ninjas Irvine	5880--Instructional Vendors &	EFT	100693	498.00	498.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/2/2024	B-268545368	4142--Code Ninjas Ladera Ranch	5880--Instructional Vendors &	EFT	100585	219.00	219.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	4/2/2024	1003	2279--Cogito International, Inc	5880--Instructional Vendors &	EFT	20136004473	260.00	260.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/23/2024	4/10/2024	B-268554201	1533--Common Thread Claremont	5880--Instructional Vendors &	EFT	20136004539	780.00	780.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/1/2024	3/14/2024	B-268528734	1533--Common Thread Claremont	5880--Instructional Vendors &	EFT	20136004424	890.00	890.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/3/2024	B-268545376	2964--Corona Inline	5880--Instructional Vendors &	EFT	20136004515	200.00	200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	3/27/2024 3/27/2024	52284 52271	5122--Crafty School Crates 5122--Crafty School Crates	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	100682 100682	544.11 544.11	145.61 398.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268545381	5520--Creative Academy Tutoring Center	5880--Instructional Vendors &	EFT	20136004528	440.00	440.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/12/2024	B-26855937	5927--Creative Brain Learning	5880--Instructional Vendors &	EFT	100707	589.18	589.18	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/9/2024	B-268552130	3240--Creative Creatures & Co.	5880--Instructional Vendors &	EFT	20136004498	1,357.94	1,357.94	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/29/2024	B-268541090	1403--Creative Learning Place Inc	5880--Instructional Vendors &	EFT	20136004447	578.00	578.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/23/2024	4/2/2024	B-268552201	v3076--Cristina E. O'Connell v3076--Cristina E. O'Connell	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004581 20136004581	1,255.00 1,255.00	1,070.00 185.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/22/2024	3/24/2024 3/22/2024	SNOP2226169911 SNOP22260566711	6177--CrunchLabs LLC 6177--CrunchLabs LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	100702 100702	193.62 193.62	96.81 96.81	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale

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4/8/2024	3/26/2024	B-268541107	5591--Faith Seymour Tutoring Services	5880--Instructional Vendors & EFT	100551	300.00	300.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/3/2024	B-268545470	1789--Fashion Camp - Create. Design. Sew. LLC 1789--Fashion Camp - Create. Design. Sew. LLC	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	20136004507 20136004507	655.25 655.25	556.25 99.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/15/2024	4/8/2024	B-268552147	5822--Fellon Ninja Academy 5822--Fellon Ninja Academy	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	100590 100590	1,534.50 1,534.50	1,344.50 190.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/8/2024	3/23/2024	B-268541109	v3022--Fired Up Arts	5880--Instructional Vendors & EFT	100553	158.00	158.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/5/2024	B-26852152	5561--Firestorm Freerunning - Galaxy LLC	5880--Instructional Vendors & EFT	20136004561	2,155.00	2,155.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/4/2024	B-26852151	1854--Firestorm Freerunning Ultra LLC	5880--Instructional Vendors & EFT	100573	650.00	650.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/4/2024	B-268545471	6042--Fit 2 Be Free LLC	5880--Instructional Vendors & EFT	100572	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/15/2024	B-268528733	6042--Fit 2 Be Free LLC	5880--Instructional Vendors & EFT	100458	221.67	221.67	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/18/2024	B-268528728	5689--Floaties Swim School, LLC	5880--Instructional Vendors & EFT	100422	110.00	110.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/7/2024	202217-75668	5470--Florida Virtual School	4100--Textbooks & Core Curricu	20136004427	475.00	475.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541110	5936--Flow Academy Jiu Jitsu 5936--Flow Academy Jiu Jitsu	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	20136004481 20136004481	1,165.00 1,165.00	290.00 875.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/1/2024	3/20/2024	B-268528724	5936--Flow Academy Jiu Jitsu	5880--Instructional Vendors & EFT	20136004412	217.50	217.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/28/2024	B-268541112	2572--Focus Dance Center	5880--Instructional Vendors & EFT	100526	385.00	385.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024	B-268525203	2361--Foothill Creative Arts Group	5880--Instructional Vendors & EFT	100657	112.00	112.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	4/3/2024	4292024	6361--Fort Cross 6361--Fort Cross	5835--Field Trips 5835--Field Trips	100539 100539	700.00 700.00	340.00 360.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/23/2024	4/10/2024	B-268525212	4174--FortePiano Music School	5880--Instructional Vendors & EFT	20136004599	195.00	195.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/26/2024	B-268535738	4174--FortePiano Music School	5880--Instructional Vendors & EFT	20136004421	195.00	195.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/19/2024	5885124	5636--Fred Pryor 5636--Fred Pryor	5895--Professional Development 5895--Professional Development	100445 100445	99.00 99.00	61.38 37.62	In Transit In Transit	909--Business Services 909--Business Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/15/2024	4/2/2024	B-268545472	6355--Freedom in Motion Gym Marietta	5880--Instructional Vendors & EFT	100609	657.00	657.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/2/2024	B-268545476	6108--Freedom in Motion, Riverside	5880--Instructional Vendors & EFT	20136004519	427.00	427.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/21/2024	B-268532035	6108--Freedom in Motion, Riverside	5880--Instructional Vendors & EFT	20136004428	212.00	212.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/28/2024	B-268541113	5820--Fundamental Chess Academy, Inc.	5880--Instructional Vendors & EFT	100521	315.00	315.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/5/2024	B-26852155	4110--Gabrina Casillas Owen	5880--Instructional Vendors & EFT	100746	420.00	420.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	3/14/2024	GG223137	v3171--Generation Genius, Inc.	4100--Textbooks & Core Curricu	100708	299.00	299.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/2/2024	B-268545481	1883--Georganne Gould	5880--Instructional Vendors & EFT	20136004497	140.00	140.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/6/2024	B-268527297	1883--Georganne Gould	5880--Instructional Vendors & EFT	20136004409	140.00	140.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/30/2024	B-268541115	1866--Giordano's ATA Martial Arts	5880--Instructional Vendors & EFT	100478	149.00	149.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/29/2024	B-268541116	6256--Glendora Music and Arts School	5880--Instructional Vendors & EFT	20136004437	635.00	635.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	4/15/2024	B-26858182	6239--Golden Star Educational Services	5880--Instructional Vendors & EFT	100734	1,100.00	1,100.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/4/2024	B-26852156	5924--Goldfish Swim School of Aliso Viejo	5880--Instructional Vendors & EFT	20136004527	364.00	364.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/30/2024	B-268541285	2171--Grace E. Hickok	5880--Instructional Vendors & EFT	20136004432	577.50	577.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268545482	2174--Gracie Barra Corona	5880--Instructional Vendors & EFT	100564	1,184.00	1,184.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/31/2024	B-268541119	5999--Gracie Barra RSM	5880--Instructional Vendors & EFT	100503	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/1/2024	642941005	6015--Granite Telecommunications 6015--Granite Telecommunications	5910--Telephone 5910--Telephone	100743 100743	2,377.18 2,377.18	903.33 1,473.85	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/22/2024	3/18/2024	1710	v3055--Green Kid Crafts	4100--Textbooks & Core Curricu	100699	103.28	103.28	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/23/2024	4/7/2024	B-26852157	1399--Gryphon Fitness Studio	5880--Instructional Vendors & EFT	20136004559	70.00	70.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/29/2024	B-268541122	2383--Guitar Ninjas 2383--Guitar Ninjas	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	100549 100549	1,480.00 1,480.00	730.00 750.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/1/2024	3/21/2024	B-268532040	2383--Guitar Ninjas 2383--Guitar Ninjas	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	100474 100474	1,330.00 1,330.00	450.00 880.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/1/2024	2/29/2024	5081	5102--Hands 4 Building	4100--Textbooks & Core Curricu	100438	389.97	389.97	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/26/2024	B-268541123	5984--Healthy Footprints Adventure Community	5880--Instructional Vendors & EFT	20136004439	90.00	90.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/30/2024	B-268541124	v3137--Hector Y. Martinez	5880--Instructional Vendors & EFT	100533	280.00	280.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/15/2024	B-26858193	6322--High Desert Math Tutor	5880--Instructional Vendors & EFT	100671	790.00	790.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/30/2024	3/29/2024	wc-22074HU	2064--History Unboxed LLC (Attr: Elizabeth Hu)	4100--Textbooks & Core Curricu	20136004610	287.60	287.60	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/29/2024	3/19/2024 3/14/2024	576144 576256	1179--Home Science Tools 1179--Home Science Tools	4310--Materials & Supplies 4310--Materials & Supplies	100772 100772	150.64 150.64	99.16 51.48	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
4/15/2024	3/21/2024	576622	1179--Home Science Tools	4310--Materials & Supplies	100623	168.20	168.20	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/13/2024	574992	1179--Home Science Tools	4310--Materials & Supplies	100515	24.00	24.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/23/2024	4/11/2024	B-26854205	5840--Homegrown Garden Skills	5880--Instructional Vendors & EFT	20136004596	200.00	200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/30/2024	4/2/2024	1426	v3071--Homeschool Planet	4100--Textbooks & Core Curricu	20136004611	59.75	59.75	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

4/1/2024	3/6/2024	268492823	4221--Parenting EO	4100--Textbooks & Core Curricu	EFT	100446	375.19	375.19	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/30/2024	4/16/2024	B-268560774	v3083--Parussus Preparatory Academy	5880--Instructional Vendors &	EFT	20136004608	3,680.90	3,680.90	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	3/28/2024	20230208	5564--Parsec Education 5564--Parsec Education	9330--Prepaid Expenses 9330--Prepaid Expenses	EFT EFT	100571 100571	21,819.60 21,819.60	8,291.45 13,528.15	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/29/2024	2/29/2024	56207	5353--Partners in Special Education	5100--SpEd Consultants and Ven	EFT	100779	455.00	422.50	In Transit	907--Special Education	2073--Excel Academy Charter School - Helendale
	2/29/2024	56209	5353--Partners in Special Education	5100--SpEd Consultants and Ven	EFT	100779	455.00	32.50	In Transit	907--Special Education	2053--Excel Academy Charter School - Warner
4/22/2024	1/31/2024	54952	5353--Partners in Special Education	5100--SpEd Consultants and Ven	EFT	100753	1,202.50	325.00	In Transit	907--Special Education	2073--Excel Academy Charter School - Helendale
	1/31/2024	54939	5353--Partners in Special Education	5100--SpEd Consultants and Ven	EFT	100753	1,202.50	877.50	In Transit	907--Special Education	2053--Excel Academy Charter School - Warner
4/22/2024	4/8/2024	B-268552209	5571--PAVE School of the Arts	5880--Instructional Vendors &	EFT	100656	790.00	790.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/19/2024	B-268528692	5571--PAVE School of the Arts	5880--Instructional Vendors &	EFT	100441	390.00	390.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/30/2024	B-268541274	v3032--Peace Hill Classical Co-op LLC v3032--Peace Hill Classical Co-op LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100512 100512	3,907.00 3,907.00	390.00 3,517.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/23/2024	4/10/2024	B-268552528	5881--Peace Love & Dance, LLC	5880--Instructional Vendors &	EFT	20136004595	60.00	60.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541276	5881--Peace Love & Dance, LLC	5880--Instructional Vendors &	EFT	20136004484	2,550.00	2,550.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	4/2/2024	99978-043024	99978--Pennyickle's Workshop, The Temecula 99978--Pennyickle's Workshop, The Temecula 99978--Pennyickle's Workshop, The Temecula	5835--Field Trips 5835--Field Trips 9388--Parent Payroll Account	EFT EFT EFT	100513 100513 100513	313.00 313.00 313.00	200.00 72.00 41.00	In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 000--Schoolwide - Revenues/BS Accounts	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/22/2024	4/15/2024	B-268558205	6319--Piter Brown Piano Studio	5880--Instructional Vendors &	EFT	100730	280.00	280.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	3/31/2024	B-268541283	2132--Piano Studio of Natalie Warren	5880--Instructional Vendors &	EFT	20136004505	202.00	202.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/8/2024	5359-040824	5359--Pitney Bowes 5359--Pitney Bowes	5930--Postage 5930--Postage	EFT EFT	20136004590 20136004590	450.03 450.03	171.01 279.02	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/8/2024	3/8/2024	5359-030624	5359--Pitney Bowes 5359--Pitney Bowes	5930--Postage 5930--Postage	EFT EFT	20136004490 20136004490	201.00 201.00	124.62 76.38	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/23/2024	4/9/2024	B-268552215	1937--Play Your Part, Inc.	5880--Instructional Vendors &	EFT	20136004542	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/15/2024	B-268528689	1937--Play Your Part, Inc.	5880--Instructional Vendors &	EFT	20136004420	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/10/2024	B-268554220	5514--Pleasant Street Stable	5880--Instructional Vendors &	EFT	100595	720.00	720.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	4/3/2024	B-268552221	6094--POM Tutors	5880--Instructional Vendors &	EFT	100652	1,755.00	1,755.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/5/2024	B-268552222	1648--Portal Languages Fullerton LLC	5880--Instructional Vendors &	EFT	100681	1,320.00	1,320.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	3/27/2024	B-268541286	5578--Power of Leverage Brazillan Ju Jitsu	5880--Instructional Vendors &	EFT	100642	175.00	175.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	4/4/2024	B-268552232	1902--Precision Gymnastics 1902--Precision Gymnastics	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100724 100724	332.00 332.00	116.00 216.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/22/2024	3/19/2024	341606-2024	6281--PRIDE Publishing LLC	4100--Textbooks & Core Curricu	EFT	100649	188.33	188.33	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	2/29/2024	341171-2024	6281--PRIDE Publishing LLC	4100--Textbooks & Core Curricu	EFT	100430	690.96	156.09	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	2/29/2024	341169-2024	6281--PRIDE Publishing LLC	4100--Textbooks & Core Curricu	EFT	100430	690.96	209.96	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	2/29/2024	341170-2024	6281--PRIDE Publishing LLC	4100--Textbooks & Core Curricu	EFT	100430	690.96	204.57	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/4/2024	341288-2024	6281--PRIDE Publishing LLC	4100--Textbooks & Core Curricu	EFT	100430	690.96	120.34	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/27/2024	883772	5363--Procopio, Cory, Hargreaves & Savitch LU 5363--Procopio, Cory, Hargreaves & Savitch LU	5810--Legal 5810--Legal	EFT EFT	100481 100481	565.70 565.70	214.97 350.73	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
4/22/2024	4/2/2024	B-268552233	6030--Providence Heart Ranch	5880--Instructional Vendors &	EFT	100701	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024	B-268552231	6020--R.I.C.A. Dance	5880--Instructional Vendors &	EFT	100719	479.30	479.30	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	3/21/2024	8003.22.24-EXC-CH	5944--Raddish Kids 5944--Raddish Kids	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	100733 100733	1,280.48 1,280.48	232.42 1,048.06	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/30/2024	4/2/2024	699145	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	191.15	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/29/2024	696282	1201--Rainbow Resource Center, Inc	4100--Materials & Supplies	EFT	20136004602	5,752.91	46.87	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/2/2024	699073	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	119.82	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/29/2024	696280	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	65.48	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/2/2024	697795	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	209.01	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/29/2024	696344	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	53.78	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/1/2024	700332	1201--Rainbow Resource Center, Inc	4310--Materials & Supplies	EFT	20136004602	5,752.91	65.92	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/3/2024	699290	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	203.03	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/3/2024	699289	1201--Rainbow Resource Center, Inc	4100--Materials & Supplies	EFT	20136004602	5,752.91	247.83	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/29/2024	696348	1201--Rainbow Resource Center, Inc	4310--Materials & Supplies	EFT	20136004602	5,752.91	201.82	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/2/2024	697799	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	170.68	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/3/2024	699292	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	33.90	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/1/2024	700331	1201--Rainbow Resource Center, Inc	4310--Materials & Supplies	EFT	20136004602	5,752.91	85.30	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/29/2024	696281	1201--Rainbow Resource Center, Inc	4310--Materials & Supplies	EFT	20136004602	5,752.91	227.53	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/29/2024	696345	1201--Rainbow Resource Center, Inc	4100--Textbooks & Supplies	EFT	20136004602	5,752.91	136.54	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/3/2024	699286	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	23.49	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/2/2024	699149	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	67.51	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/1/2024	699792	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	321.71	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/4/2024	701338	1201--Rainbow Resource Center, Inc	4100--Materials & Supplies	EFT	20136004602	5,752.91	124.21	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/1/2024	699793	1201--Rainbow Resource Center, Inc	4310--Materials & Supplies	EFT	20136004602	5,752.91	120.47	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/2/2024	699147	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	247.17	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/2/2024	699798	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	402.05	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/4/2024	701341	1201--Rainbow Resource Center, Inc	4310--Materials & Supplies	EFT	20136004602	5,752.91	234.16	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/2/2024	697800	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	200.12	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/29/2024	696308	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	94.61	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/4/2024	699291	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	119.68	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/29/2024	696346	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	85.14	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/2/2024	699141	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	31.85	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/3/2024	699287	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	31.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/1/2024	699143	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	27.09	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/3/2024	699288	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	77.21	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/2/2024	699143	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	78.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/3/2024	699146	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	299.22	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/4/2024	701343	1201--Rainbow Resource Center, Inc	4100--Materials & Supplies	EFT	20136004602	5,752.91	130.23	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/3/2024	699794	1201--Rainbow Resource Center, Inc	4310--Materials & Supplies	EFT	20136004602	5,752.91	84.54	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	4/4/2024	701344	1201--Rainbow Resource Center, Inc	4310--Materials & Supplies	EFT	20136004602	5,752.91	87.40	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/3/2024	700348	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136004602	5,752.91	251.45	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	4/3/2024	701345	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	2013600					

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

4/15/2024	3/26/2024	B-268541288	6202--Reign Equine Riding 6203--Reign Equine Riding	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004513 20136004513	1,530.00 1,530.00	900.00 630.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/8/2024	3/31/2024	B-268541284	1018--Reynaldo & Maria Laura D'Angelo DBA Por	5880--Instructional Vendors &	EFT	100480	243.75	243.75	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268541289	6251--Riffs Music	5880--Instructional Vendors &	EFT	20136004532	1,360.00	1,360.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/23/2024	4/2/2024	B-268552267	2998--Riverside Aquatics Association	5880--Instructional Vendors &	EFT	20136004598	470.45	470.45	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/4/2024	B-268552279	5453--Riverside Ballet Arts	5880--Instructional Vendors &	EFT	100740	340.00	340.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/23/2024	3/28/2024	HW201747	99950--Riverside Insights 99950--Riverside Insights	4350--Other Supplies - Materia 4350--Other Supplies - Materia	EFT EFT	20136004562 20136004562	1,087.50 1,087.50	413.25 674.25	In Transit In Transit	906--Education Services 906--Education Services	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Warner
4/23/2024	4/1/2024	B-268552285	2381--Robin Nesom Young	5880--Instructional Vendors &	EFT	20136004555	280.00	280.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/31/2024	B-268541292	5589--Rock Fitness	5880--Instructional Vendors &	EFT	100508	595.00	595.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	3/27/2024	B-268541296	3310--Rocksides Music Inc	5880--Instructional Vendors &	EFT	20136004494	360.00	360.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/27/2024	B-268541299	V3084--Rockstars of Tomorrow Riverside	5880--Instructional Vendors &	EFT	100500	1,142.50	1,142.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/3/2024	B-268552288	2107--Rockstars of Tomorrow, Inc - Narco	5880--Instructional Vendors &	EFT	100727	232.50	232.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/3/2024	B-268552286	3306--Rockstars of Tomorrow, Inc - Chino Hills	5880--Instructional Vendors &	EFT	100596	503.75	503.75	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/23/2024	4/8/2024	B-268552290	2315--Rbos Music	5880--Instructional Vendors &	EFT	20136004570	390.00	390.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/25/2024	B-268535744	1877--Rbse Bowl Aquatics Center (S)	5880--Instructional Vendors &	EFT	100429	225.00	225.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/29/2024	B-268541301	1926--Rbyce Gracie Ju Jitsu Academy	5880--Instructional Vendors &	EFT	20136004482	594.00	594.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	3/26/2024	B-268541303	5880--Russian School of Mathematics Irvine	5880--Instructional Vendors &	EFT	100586	491.00	491.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	3/30/2024	B-268541306	5941--Russian School of Mathematics South Ori	5880--Instructional Vendors &	EFT	100589	664.50	664.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/29/2024	4/26/2024	5367-042624	5367--San Bernardino Superintendent Of School	9525--STRS	Printed Check	30107	83,823.79	83,823.79	In Transit	000--Schoolwide - Revenues/BS Accounts	2073--Excel Academy Charter School - Helendale
4/15/2024	3/31/2024	B-268541309	6038--San Clemente Dance & Performing Arts C	5880--Instructional Vendors &	EFT	20136004525	952.53	952.53	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	2861	6280--Schola Inc. 6280--Schola Inc.	5841--Community Marketing 5841--Community Marketing	EFT EFT	20136004478 20136004478	3,500.00 3,500.00	1,320.00 2,170.00	In Transit In Transit	913--Marketing 913--Marketing	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/22/2024	3/4/2024	9964212	1290--Scholastic Inc.	4310--Materials & Supplies	EFT	100645	31.30	31.30	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/29/2024	4/10/2024 4/10/2024	5368--School Pathways, LLC 140-IMW6325 5368--School Pathways, LLC	5830--Non-Instructional Softwa 5830--Non-Instructional Softwa	5830--Non-Instructional Softwa 5830--Non-Instructional Softwa	EFT EFT	100762 100762	27,106.00 27,106.00	17,677.92 9,428.08	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/22/2024	3/15/2024	W135978-IN	5756--School Services of California, Inc. 5756--School Services of California, Inc.	5895--Professional Development 5895--Professional Development	EFT EFT	100666 100666	275.00 275.00	170.50 104.50	In Transit In Transit	909--Business Services 909--Business Services	2053--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
4/15/2024	4/1/2024	014184-IN	5756--School Services of California, Inc. 5756--School Services of California, Inc.	5300--Dues & Memberships 5300--Dues & Memberships	EFT EFT	100640 100640	355.00 355.00	220.10 134.90	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/8/2024	3/31/2024	B-268541315	5961--Science Classroom Plus	5880--Instructional Vendors &	EFT	100524	228.75	228.75	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/29/2024	B-268541318	1027--Science 2-U 1027--Science 2-U	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100485 100485	4,018.04 4,018.04	646.50 3,371.54	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/22/2024	1/31/2024	2.02401E+14	6026--SEAWORLD LLC 6026--SEAWORLD LLC 6026--SEAWORLD LLC	9388--Field Trips 9388--Field Trips 9388--Field Trips	EFT EFT EFT	100704 100704 100704	1,600.00 1,600.00 1,600.00	232.00 432.00 936.00	In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
4/22/2024	4/2/2024 4/10/2024	B-268552293 B-268554221	5548--Sektor Ju-Jitsu 5548--Sektor Ju-Jitsu	5880--Instructional Vendors & 5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT EFT	100683 100683 100683	1,391.00 1,391.00 1,391.00	590.00 481.00 320.00	In Transit In Transit In Transit	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
4/8/2024	3/30/2024	B-268541144	4107--Shinja Km	5880--Instructional Vendors &	EFT	20136004431	440.00	440.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024	B-268552534	1551--Sierra Madre Dance Center	5880--Instructional Vendors &	EFT	100723	376.00	376.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Helendale
4/8/2024	3/26/2024	B-268541321	2880--Signing the Gap	5880--Instructional Vendors &	EFT	20136004458	63.00	63.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	4/12/2024	B-268558209	5726--Silva Ju-Jitsu Academy	5880--Instructional Vendors &	EFT	100680	750.00	750.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/29/2024	4/4/2024 3/29/2024 4/2/2024 3/28/2024 3/27/2024 3/29/2024 4/4/2024	S311321 S311005 S311175 S310854 S310255 S310946 S311320	1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc	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	EFT EFT EFT EFT EFT EFT EFT	100785 100785 100785 100785 100785 100785 100785	602.81 602.81 602.81 602.81 602.81 602.81 602.81	30.09 174.50 481.00 74.41 45.90 33.63 69.78	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 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
4/22/2024	3/25/2024 3/26/2024 3/26/2024	S310595 S310697 S310700	1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT EFT	100662 100662 100662	321.94 321.94 321.94	191.76 85.00 45.18	In Transit In Transit In Transit	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
4/15/2024	3/19/2024 3/7/2024	S310134 S309102	1208--Singapore Math Inc 1208--Singapore Math Inc	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	100576 100576	130.02 130.02	45.02 85.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
4/8/2024	3/6/2024	S308656	1208--Singapore Math Inc	4100--Textbooks & Core Curricu	EFT	100534	298.77	298.77	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/1/2024	2/28/2024 3/4/2024 3/17/2024 3/6/2024	S308070 S308469 S309128 S308745	1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc 1208--Singapore Math Inc	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT EFT EFT	100428 100428 100428 100428	558.52 558.52 558.52 558.52	110.71 191.76 45.32 210.73	In Transit In Transit In Transit In Transit	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 2073--Excel Academy Charter School - Helendale
4/1/2024	2/5/2024	307241	2460--Singapore Math Live	4100--Textbooks & Core Curricu	EFT	100420	75.00	75.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	2/6/2024	4505	5556--Small Talk OC	5100--SpEd Consultants and Ven	EFT	100697	810.00	810.00	In Transit	vech Services	907--Special Education
4/30/2024	4/15/2024	B-268560776	5792--Soaring Minds Education	5880--Instructional Vendors &	EFT	20136004606	2,537.00	2,537.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/27/2024	B-268535745	6036--Sokol Gymnastics LLC	5880--Instructional Vendors &	EFT	100432	205.00	205.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/23/2024	4/2/2024	B-268552295	1412--South Coast Conservatory	5880--Instructional Vendors &	EFT	20136004557	850.00	850.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/26/2024	B-268535748	1412--South Coast Conservatory	5880--Instructional Vendors &	EFT	20136004411	850.00	850.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

4/22/2024	4/3/2024	B-26855297	3365--South Coast Repertory, Inc. 3365--South Coast Repertory, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100666 100666	581.67 581.67	186.67 395.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024	B-26855236	1874--South County Dance Inc.	5880--Instructional Vendors &	EFT	100757	1,397.50	1,397.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268552300	v3029--South OC Hybrid Homeschool	5880--Instructional Vendors &	EFT	100584	280.00	280.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/18/2024	B-268560777	5675--South OC Sports	5880--Instructional Vendors &	EFT	100655	950.00	950.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268541324	5675--South OC Sports	5880--Instructional Vendors &	EFT	100626	1,450.00	1,450.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024	B-268554223	5948--South Shore Ju Jitsu & MMA	5880--Instructional Vendors &	EFT	100658	375.00	375.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	3/29/2024	B-268541329	5487--Southland Ballet Academy	5880--Instructional Vendors &	EFT	100604	645.00	645.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541331	2583--Spanish Advantage 2583--Spanish Advantage	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004446 20136004446	1,196.25 1,196.25	683.75 512.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/23/2024	4/3/2024	B-268552301	4111--Spanish Time 123 4111--Spanish Time 123	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004594 20136004594	327.01 327.01	80.00 247.01	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Warner
4/29/2024	2/29/2024	EXCL02-0224	5378--Specialized Therapy Services, Inc. 5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100791 100791	2,140.63 2,140.63	315.00 303.13	In Transit In Transit	907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Warner
4/29/2024	2/29/2024	EXCL01-0224	5378--Specialized Therapy Services, Inc. 5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100791 100791	2,140.63 2,140.63	1,522.50 1,522.50	In Transit In Transit	907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Warner
4/8/2024	3/30/2024	B-268541333	6276--Sprout and Blossom	5880--Instructional Vendors &	EFT	100494	263.40	263.40	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/29/2024	B-268541337	1540--StageLight Performing Arts	5880--Instructional Vendors &	EFT	20136004476	120.00	120.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/1/2024	3/2/2024	3561285819	1264--Staples	4310--Materials & Supplies	EFT	20136004419	338.84	247.17	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/9/2024	3561742726	1264--Staples	4310--Materials & Supplies	EFT	20136004419	338.84	34.58	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/9/2024	3561742727	1264--Staples	4310--Materials & Supplies	EFT	20136004419	338.84	35.38	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	3/9/2024	3561742727	1264--Staples	4320--Office Supplies	EFT	20136004419	338.84	21.69	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	4/3/2024	B-268552305	5473--STEM Academy 5473--STEM Academy	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004587 20136004587	3,097.92 3,097.92	200.00 2,897.92	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/23/2024	4/3/2024	B-268552307	2505--STEM Center USA	5880--Instructional Vendors &	EFT	20136004543	415.00	415.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Warner
4/8/2024	2/19/2024	21024	6354--Storm Stadium 6354--Storm Stadium 6354--Storm Stadium	5835--Field Trips 9388--Parent Rpt/Bl Account 5835--Field Trips	EFT EFT EFT	100483 100483 100483	105.00 105.00 105.00	45.00 6.00 54.00	In Transit In Transit In Transit	910--Instructional Funds 000--Schoolwide-Revenues/BS Accounts 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
4/1/2024	2/29/2024	502869	2129--Studies Weekly	4100--Textbooks & Core Curricu	EFT	100414	87.49	87.49	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/8/2024	3/26/2024	B-268541340	6234--Sundance Music Group LLC	5880--Instructional Vendors &	EFT	20136004443	510.00	510.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	3/27/2024	B-268541344	5833--Susan Sanders	5880--Instructional Vendors &	EFT	100597	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Warner
4/15/2024	3/27/2024	B-268541349	2030--Suzuki Piano and Ultimate Musk. Theory	5880--Instructional Vendors &	EFT	20136004512	152.00	152.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/27/2024	B-268541353	6182--Sweetwater Farms	5880--Instructional Vendors &	EFT	100531	502.50	502.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	3/23/2024	662286	2536--TalkBox Mom	4100--Textbooks & Core Curricu	EFT	100749	193.96	193.96	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/1/2024	3/15/2024	B-K05J9BV	6324--Tanaka Farms LLC 6324--Tanaka Farms LLC 6324--Tanaka Farms LLC 6324--Tanaka Farms LLC 6324--Tanaka Farms LLC 6324--Tanaka Farms LLC	9388--Parent Rpt/Bl Account 5835--Field Trips 5835--Field Trips 5835--Field Trips 5835--Field Trips 9388--Parent Rpt/Bl Account	EFT EFT EFT EFT EFT EFT	100461 100461 100461 100461 100461 100461	1,465.20 1,465.20 1,465.20 1,465.20 1,465.20 1,465.20	0.92 612.00 496.00 180.00 162.00 24.28	In Transit In Transit In Transit In Transit In Transit In Transit	000--Schoolwide-Revenues/BS Accounts 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 000--Schoolwide-Revenues/BS Accounts	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
4/22/2024	4/8/2024	B-268552310	70072--Taryn Sains	5880--Instructional Vendors &	EFT	100312	655.00	655.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/19/2024	B-268528687	v3037--Taryn Sains	5880--Instructional Vendors &	EFT	100443	655.00	655.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	2/26/2024	2024-384410	6070--Taste 6070--Taste	4330--Meals & Events 4330--Meals & Events	EFT EFT	100413 100413	4,808.62 4,808.62	1,827.28 2,981.34	In Transit In Transit	914--Community Engagement 914--Community Engagement	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/22/2024	3/18/2024	260848061	5395--TeachersByTeachers	4100--Textbooks & Core Curricu	EFT	100685	109.53	109.53	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	3/18/2024	260789434	5395--TeachersByTeachers	4100--Textbooks & Core Curricu	EFT	100502	146.18	2.28	In Transit	906--Education Services	2073--Excel Academy Charter School - Helendale
	3/12/2024	260264215	5395--TeachersByTeachers 5395--TeachersByTeachers 5395--TeachersByTeachers	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT EFT	100502 100502 100502	146.18 146.18 146.18	3.72 46.51 93.67	In Transit In Transit In Transit	906--Education Services 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
4/22/2024	3/25/2024	55408	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	EFT	100690	152.97	152.97	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	3/19/2024	55353	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	EFT	100641	58.95	58.95	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/1/2024	3/1/2024	55115	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	EFT	100465	114.87	114.87	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/4/2024	B-268552312	6188--Telos Academy	5880--Instructional Vendors &	EFT	100580	594.40	594.40	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	4/2/2024	B-268552313	5998--Temecula Music Teacher LLC	5880--Instructional Vendors &	EFT	100751	274.00	274.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/9/2024	B-268552317	1071--Terra Arts Foundation 1071--Terra Arts Foundation	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100667 100667	6,715.00 6,715.00	1,380.00 5,335.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/15/2024	3/25/2024	B-268541357	5682--The Art House 5682--The Art House	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100613 100613	715.00 715.00	195.00 520.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/22/2024	4/10/2024	B-268552537	5886--The Backyard Schoolhouse	5880--Instructional Vendors &	EFT	100688	75.00	75.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/8/2024	4/1/2024	B-268541361	1917--The Center Stage Studio	5880--Instructional Vendors &	EFT	100497	831.67	831.67	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024	B-268554226	v16222--The Claremont Club	5880--Instructional Vendors &	EFT	100709	5,644.00	5,644.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	4/2/2024	B-268552319	5702--The Coder School Mission Viejo	5880--Instructional Vendors &	EFT	100670	269.00	269.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/15/2024	4/1/2024	B-268545373	1984--The Colburn School 1984--The Colburn School	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004518 20136004518	463.77 463.77	415.77 48.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/29/2024	3/7/2024	SI-203741	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	100770	161.08	161.08	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	3/21/2024	SI-204700	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	100721	468.23	211.93	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/20/2024	SI-204599	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	100721	468.23	162.86	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
	3/20/2024	SI-204610	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	100721	468.23	93.44	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

4/15/2024	3/18/2024	SI-204462	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	100574	70.97	70.97	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/1/2024	2/16/2024	SI-202335	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	100431	64.55	64.55	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/23/2024	4/2/2024	B-268552325	3302--The Music Abode	5880--Instructional Vendors &	EFT	20136004549	600.00	600.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/15/2024	3/29/2024	B-268541367	6321--The Red Apple Project	5880--Instructional Vendors &	EFT	100620	1,021.25	1,021.25	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/23/2024	4/2/2024	B-268552326	6378--The Rok Music Academy	5880--Instructional Vendors &	EFT	20136004586	690.00	690.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/29/2024	3/28/2024	EX2024.02	5400--Therapy in Action	5100--SpEd Consultants and Ven	EFT	100776	440.00	440.00	In Transit	OT services 907--Special Education		2073--Excel Academy Charter School - Helendale
4/22/2024	3/27/2024	207378	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	100691	29.95	29.95	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/22/2024	1/31/2024	207304	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	100644	188.95	159.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
	1/31/2024	207303	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	100644	188.95	29.95	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/18/2024	1/31/2024	207304	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	Voided - 100135	-188.95	-159.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
	1/31/2024	207303	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	Voided - 100135	-188.95	-29.95	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/8/2024	3/18/2024	207369	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	100495	67.61	67.61	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/22/2024	4/4/2024	B-268552327	2117--Thrive Academics, Inc	5880--Instructional Vendors &	EFT	100732	600.00	600.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/1/2024	3/4/2024	434648	2134--Timberdoole	4310--Materials & Supplies	EFT	100468	231.38	231.38	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/30/2024	3/29/2024	7725678	1771--Time4Learning.com	4100--Textbooks & Core Curricu	EFT	20136004616	75.00	75.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/23/2024	4/8/2024	B-268552330	1409--To the Pointe Dance Productions	5880--Instructional Vendors &	EFT	20136004584	763.00	763.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/22/2024	4/11/2024	B-268554228	6014--TOCA Soccer	5880--Instructional Vendors &	EFT	100650	90.00	90.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/1/2024	3/21/2024	B-268528737	1107--Todd Nash	5880--Instructional Vendors &	EFT	100439	4,140.00	420.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
			1107--Todd Nash	5880--Instructional Vendors &	EFT	100439	4,140.00	3,720.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024	B-268554229	2267--Top Billing Entertainment Performance A	5880--Instructional Vendors &	EFT	100728	52.00	52.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/15/2024	3/29/2024	B-268541369	3086--Torres Fine Arts Instruction	5880--Instructional Vendors &	EFT	20136004495	275.00	275.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/29/2024	3/8/2024	7455443	5411--Total Education Solutions	5100--SpEd Consultants and Ven	EFT	100769	2,868.75	911.25	In Transit	APE Services 907--Special Education		2073--Excel Academy Charter School - Helendale
	3/28/2024	7571628	5411--Total Education Solutions	5100--SpEd Consultants and Ven	EFT	100769	2,868.75	438.75	In Transit	APE Services 907--Special Education		2053--Excel Academy Charter School - Warner
			5411--Total Education Solutions	5100--SpEd Consultants and Ven	EFT	100769	2,868.75	807.50	In Transit	SAI Services 907--Special Education		2073--Excel Academy Charter School - Helendale
	3/8/2024	7455442	5411--Total Education Solutions	5100--SpEd Consultants and Ven	EFT	100769	2,868.75	475.00	In Transit	SAI Services 907--Special Education		2053--Excel Academy Charter School - Warner
			5411--Total Education Solutions	5100--SpEd Consultants and Ven	EFT	100769	2,868.75	236.25	In Transit	APE Services 907--Special Education		2053--Excel Academy Charter School - Warner
4/1/2024	3/8/2024	IND00439	1307--TouchMath Acquisition LLC	4100--Textbooks & Core Curricu	EFT	100419	534.47	428.26	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
	3/8/2024	IND00437	1307--TouchMath Acquisition LLC	4100--Textbooks & Core Curricu	EFT	100419	534.47	106.21	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/23/2024	4/10/2024	B-268554231	2798--Traditional Equation School	5880--Instructional Vendors &	EFT	20136004579	352.00	352.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/22/2024	4/10/2024	B-268552494	2717--Tree of Knowledge	5880--Instructional Vendors &	EFT	100715	1,540.00	275.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
			2717--Tree of Knowledge	5880--Instructional Vendors &	EFT	100715	1,540.00	1,265.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/15/2024	3/31/2024	B-268541373	5877--Ultra Jiu Jitsu Academy	5880--Instructional Vendors &	EFT	20136004522	495.00	495.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/29/2024	4/20/2024	00002E01V5164	1649--LPS	5930--Postage	EFT	100787	171.89	65.32	In Transit	912--Administration/Office		2073--Excel Academy Charter School - Helendale
			1649--LPS	5930--Postage	EFT	100787	171.89	106.57	In Transit	912--Administration/Office		2053--Excel Academy Charter School - Warner
4/22/2024	4/13/2024	00002E01V5154	1649--LPS	5930--Postage	EFT	100785	116.49	72.22	In Transit	912--Administration/Office		2053--Excel Academy Charter School - Warner
			1649--LPS	5930--Postage	EFT	100785	116.49	44.27	In Transit	912--Administration/Office		2073--Excel Academy Charter School - Helendale
4/9/2024	4/6/2024	00002E01V5144	1649--LPS	5930--Postage	EFT	100561	18.11	6.88	In Transit	912--Administration/Office		2073--Excel Academy Charter School - Helendale
			1649--LPS	5930--Postage	EFT	100561	18.11	11.23	In Transit	912--Administration/Office		2053--Excel Academy Charter School - Warner
4/8/2024	3/30/2024	00002E01V5134	1649--LPS	5930--Postage	EFT	100535	133.57	50.76	In Transit	912--Administration/Office		2073--Excel Academy Charter School - Helendale
			1649--LPS	5930--Postage	EFT	100535	133.57	82.81	In Transit	912--Administration/Office		2053--Excel Academy Charter School - Warner
4/1/2024	3/23/2024	00002E01V5124	1649--LPS	5930--Postage	EFT	100460	194.69	73.98	In Transit	912--Administration/Office		2073--Excel Academy Charter School - Helendale
			1649--LPS	5930--Postage	EFT	100460	194.69	120.71	In Transit	912--Administration/Office		2053--Excel Academy Charter School - Warner
4/29/2024	4/18/2024	B-268560778	2211--Valerie Marich Music	5880--Instructional Vendors &	EFT	100777	300.00	300.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/23/2024	4/9/2024	B-268552333	5875--Valley Wide Elite Gymnastics	5880--Instructional Vendors &	EFT	20136004593	1,140.00	1,140.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/1/2024	3/25/2024	B-268535749	5875--Valley Wide Elite Gymnastics	5880--Instructional Vendors &	EFT	20136004416	119.00	119.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/15/2024	3/28/2024	9960377206	5421--Verizon Wireless	5910--Telephone	EFT	100625	837.32	519.14	In Transit	912--Administration/Office		2053--Excel Academy Charter School - Warner
			5421--Verizon Wireless	5910--Telephone	EFT	100625	837.32	318.18	In Transit	912--Administration/Office		2073--Excel Academy Charter School - Helendale
4/23/2024	4/2/2024	B-268552318	2738--Veronica Gutierrez	5880--Instructional Vendors &	EFT	20136004567	67.50	67.50	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/22/2024	4/3/2024	B-268552336	2627--Veronica Richards Violin Studio	5880--Instructional Vendors &	EFT	100705	150.00	150.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/23/2024	4/11/2024	B-268554233	5581--Victory Aquatics	5880--Instructional Vendors &	EFT	20136004575	180.00	180.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/8/2024	3/29/2024	B-268541377	2959--Victory Tae Kwon Do USA	5880--Instructional Vendors &	EFT	20136004474	240.00	240.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/23/2024	4/15/2024	B-268558210	6134--Virtues Art Academy	5880--Instructional Vendors &	EFT	20136004563	75.00	75.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/1/2024	3/14/2024	B-268528682	6134--Virtues Art Academy	5880--Instructional Vendors &	EFT	20136004423	150.00	150.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/30/2024	4/2/2024	B1437	3167--Wiseca Blomes	4100--Textbooks & Core Curricu	EFT	20136004603	320.00	320.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/1/2024	3/17/2024	B-268528677	2127--Waterfront Education	5880--Instructional Vendors &	EFT	20136004410	670.00	210.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
			2127--Waterfront Education	5880--Instructional Vendors &	EFT	20136004410	670.00	460.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/23/2024	4/9/2024	B-268552340	2202--Watersafe Swim School Inc.	5880--Instructional Vendors &	EFT	20136004568	96.00	284.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
			2202--Watersafe Swim School Inc.	5880--Instructional Vendors &	EFT	20136004568	96.00	677.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/22/2024	4/11/2024	B-268554236	1804--We Break Hip Hop Dance Company	5880--Instructional Vendors &	EFT	100689	74.00	74.00	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner
4/22/2024	4/1/2024	B-268552342	1761--We Spark Learning	5880--Instructional Vendors &	EFT	100750	74.00	74.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/1/2024	3/19/2024	B-268528674	1761--We Spark Learning	5880--Instructional Vendors &	EFT	100457	74.00	74.00	In Transit	910--Instructional Funds		2073--Excel Academy Charter School - Helendale
4/1/2024	3/7/2024	B-268527389	5763--West Coast Krav Maga Murrieta	5880--Instructional Vendors &	EFT	100472	236.25	236.25	In Transit	910--Instructional Funds		2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM

4/15/2024	4/3/2024	B-26854512	2337--Wilcats Hockey LLC 2337--Wilcats Hockey LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100603 100603	3,558.75 3,558.75	2,348.75 1,210.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Helendale
4/1/2024	3/8/2024	1231	1309--Williamsburg Learning	4100--Textbooks & Core Curricu	EFT	100450	475.00	475.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/22/2024	3/21/2024	INV52734	6102--Wilson Language Training Corporation	4100--Textbooks & Core Curricu	EFT	100663	78.04	78.04	In Transit	908--Intervention/Title I	2053--Excel Academy Charter School - Warner
4/1/2024	2/2/2024	INV49999	6102--Wilson Language Training Corporation	4100--Textbooks & Core Curricu	EFT	100434	11.56	11.56	In Transit	908--Intervention/Title I	2073--Excel Academy Charter School - Helendale
4/22/2024	4/10/2024	B-268552538	6009--Winners Circle Athletics 6009--Winners Circle Athletics	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100741 100741	2,900.00 2,900.00	1,100.00 1,800.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/1/2024	3/25/2024	B-268535751	6009--Winners Circle Athletics 6009--Winners Circle Athletics	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100423 100423	3,900.00 3,900.00	1,850.00 2,050.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/8/2024	3/29/2024	B-268541380	1033--WM Music: Lessons 1033--WM Music: Lessons	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	2013600486 2013600486	3,270.00 3,270.00	1,195.00 2,075.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/15/2024	3/29/2024	B-268541382	4121--Wm Tutoring Services 4121--Wm Tutoring Services	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004524 20136004524	1,160.00 1,160.00	960.00 200.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/29/2024	4/16/2024	B-268560779	2092--World Elite Gymnastics	5880--Instructional Vendors &	EFT	100766	651.80	651.80	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/23/2024	4/10/2024	B-268552540	3212--WriteAtHome, Inc. 3212--WriteAtHome, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004571 20136004571	772.50 772.50	473.50 299.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/22/2024	4/2/2024	B-268552348	1586--Whittemburg Door 1586--Whittemburg Door	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004558 20136004558	7,187.50 7,187.50	2,174.75 5,012.75	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/22/2024	4/10/2024 4/10/2024	B-268552550 B-268552543	2255--Yamaha Music: School Cerritos/Chino Hill 2255--Yamaha Music: School Cerritos/Chino Hill	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100726 100726	1,370.00 1,370.00	266.00 234.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
4/15/2024	4/4/2024	B-268545364	4101--Yvonne Dill Cruz	5880--Instructional Vendors &	EFT	100601	675.00	675.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/22/2024	4/3/2024	B-268552355	2309--Zak Barnett Studios	5880--Instructional Vendors &	EFT	100720	399.00	399.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/15/2024	4/4/2024	INV251285877	5437--Zoom Video Communications Inc. 5437--Zoom Video Communications Inc.	5940--Technology Services 5940--Technology Services	EFT EFT	100632 100632	378.93 378.93	234.94 143.99	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
4/15/2024	3/30/2024	B-268541387	6253--Zooz Fitness LLC	5880--Instructional Vendors &	EFT	20136004529	542.57	542.57	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
Total for CHASE 9313							827,792.45	827,792.45			

Cash Requirements Statement

EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 5DB38A5BF

Period Ending: 02/29/2024

Check Date: 03/08/2024

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 03/07/2024

A wire request for \$32,608.63 will be sent to your bank on 03/06/2024

Items

Checks / Vouchers	21
Additional Direct Deposit Accounts	1

Billing

Check Processing/Tax Service	625.66
Direct Deposit	7.25
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	No Charge
Total Billing	638.91

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,245.12	1,245.12	2,490.24
Medicare	453.65	453.65	907.30
Federal W/H Tax	1,319.26		1,319.26
California W/H Next Day	653.08		653.08
California SDI Next Day	349.05		349.05
California ETT Qtrly		5.82	5.82
California SUTA		151.57	151.57
Total Tax Deposits	4,020.16	1,856.16	5,876.32

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	24,646.36
Direct Deposit Distribution - Paycom Pay	1,447.04
Taxes - PAYCOM Resp.	5,876.32
Payroll Fee	638.91
Total Paycom Cash Requirements	32,608.63

Total Cash Requirements

32,608.63

Cash Requirements Statement

EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 1790AFAAF

Period Ending: 03/31/2024

Check Date: 04/10/2024

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 04/09/2024

A wire request for \$35,129.24 will be sent to your bank on 04/08/2024

Items

Checks / Vouchers	21
Additional Direct Deposit Accounts	1

Billing

Check Processing/Tax Service	625.66
Direct Deposit	7.25
Jurisdiction Filing	6.00
Garnishment Fee this Payroll	No Charge
Total Billing	<u>638.91</u>

Tax Deposits

	<u>Employee Deductions</u>	<u>Employer Liability</u>	<u>Total Deposit</u>
FICA/Social Security	1,300.59	1,300.59	2,601.18
Medicare	494.94	494.94	989.88
Federal W/H Tax	1,440.18		1,440.18
California W/H Next Day	749.15		749.15
California SDI Next Day	381.09		381.09
California ETT Qtrly		6.83	6.83
California SUTA		177.65	177.65
Total Tax Deposits	<u>4,365.95</u>	<u>1,980.01</u>	<u>6,345.96</u>

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	26,697.33
Direct Deposit Distribution - Paycom Pay	1,447.04
Taxes - PAYCOM Resp.	6,345.96
Payroll Fee	638.91
Total Paycom Cash Requirements	<u>35,129.24</u>

Total Cash Requirements

35,129.24

Cash Requirements Statement

EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 9A05229F1

Period Ending: 04/15/2024

Check Date: 04/26/2024

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 04/25/2024

A wire request for \$33,613.16 will be sent to your bank on 04/24/2024

Items

Checks / Vouchers	20
Additional Direct Deposit Accounts	2

Billing

Check Processing/Tax Service	613.85
Direct Deposit	7.50
Jurisdiction Filing	18.00
Garnishment Fee this Payroll	No Charge
Additional Services	2,200.00
Total Billing	2,839.35

Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,375.40	1,375.40	2,750.80
Medicare	436.63	436.63	873.26
Federal W/H Tax	1,372.23		1,372.23
California W/H Next Day	655.43		655.43
California SDI Next Day	337.21		337.21
California ETT Qtrly		3.33	3.33
California SUTA		86.85	86.85
Total Tax Deposits	4,176.90	1,902.21	6,079.11

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	21,297.45
Direct Deposit Distribution - Paycom Pay	3,397.25
Taxes - PAYCOM Resp.	6,079.11
Payroll Fee	2,839.35
Total Paycom Cash Requirements	33,613.16

Total Cash Requirements

33,613.16

EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: CADBEAB78

Period Ending: 04/30/2024

Check Date: 04/26/2024

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 04/25/2024

A wire request for \$748,580.12 will be sent to your bank on 04/24/2024

Items

Checks / Vouchers	101
Additional Direct Deposit Accounts	11

Billing

Check Processing/Tax Service	1,705.63
Direct Deposit	9.75
Jurisdiction Filing	18.00
Garnishment Fee this Payroll	No Charge
Total Billing	<u>1,733.38</u>

Tax Deposits

	<u>Employee Deductions</u>	<u>Employer Liability</u>	<u>Total Deposit</u>
FICA/Social Security	4,591.96	4,591.96	9,183.92
Medicare	11,842.49	11,842.49	23,684.98
Federal W/H Tax	65,929.98		65,929.98
California W/H Next Day	32,422.28		32,422.28
California SDI Next Day	8,857.10		8,857.10
Hawaii W/H Semiweekly	845.59		845.59
Hawaii SUTA		165.02	165.02
Total Tax Deposits	<u>124,489.40</u>	<u>16,599.47</u>	<u>141,088.87</u>

Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	579,199.68
Direct Deposit Distribution - Paycom Pay	26,558.19
Taxes - PAYCOM Resp.	141,088.87
Payroll Fee	1,733.38
Total Paycom Cash Requirements	<u>748,580.12</u>

Total Cash Requirements

748,580.12



Renewal Membership Agreement: 2024-2025

Term and Fee

The agreement below outlines the term and fee associated with your BoardOnTrack membership renewal. Your membership fee is due 30 days prior to the Renewal Start Date.

After you electronically sign this contract, we will send an invoice to the invoice email address listed below. Please let us know if any billing information is incorrect. It is okay to sign the contract and then let us know via email of any changes to billing information.

Member Billing Information

Member	Excel Academy (CA)
Billing Address	1 Technology Drive Suite I-811 Irvine, CA 92618
Billing Contact Name	Lauren Hansen
Billing Contact Role	Operations Coordinator
Billing Contact Email Address	lhansen@excelacademy.education
Billing Contact Phone Number	(949) 387-7822

Invoice Will Be Sent To:	lhansen@excelacademy.education
--------------------------	--------------------------------

Membership Terms

Renewal Start Date	07 / 01 / 2024
Membership Package	Operations
Membership Term	1 year
Membership Fee	\$5,495.00

By signing this agreement, Excel Academy (CA) agrees to the terms described above.

Authorized Signature


Accepted By (Member) Heidi Gasca

Printed Name: Heidi Gasca Date of Member Acceptance: 03 / 07 / 2024

I read, understand, and accept the BoardOnTrack Terms and Conditions available [here](#). I certify that I am authorized to sign and enter into an agreement for the organization purchasing the BoardOnTrack Membership. Note: You can find BoardOnTrack's W-9 form [here](#).

Signature Certificate

Reference number: ARWX8-JGSYJ-IUEQM-IN8G4

Signer	Timestamp	Signature
Heidi Gasca Email: hgasca@excelacademy.education		
Sent:	07 Mar 2024 00:02:46 UTC	
Viewed:	07 Mar 2024 16:51:43 UTC	
Signed:	07 Mar 2024 19:30:00 UTC	
Recipient Verification:		IP address: 107.127.56.53
✓Email verified	07 Mar 2024 16:51:43 UTC	Location: Los Angeles, United States

Document completed by all parties on:
07 Mar 2024 19:30:00 UTC

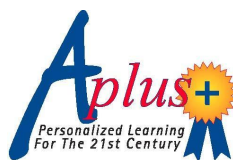
Page 1 of 1



Signed with PandaDoc

PandaDoc is a document workflow and certified eSignature solution trusted by 50,000+ companies worldwide.





the Association of Personalized Learning Schools & Services

Every Child's Learning is Personal

Jeff Rice, Founder/Director
18820 Lodestone Court, Penn Valley, CA. 95946
Voice: 530.432.3609; Fax: 530.432.3610
Email: jeffrice@jps.net; Tax ID #567-84-5112

INVOICE

#04042407

Date: April 4, 2024

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

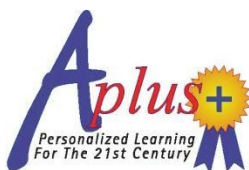
Amount Due: \$14,750.00 *
(The sum fourteen thousand seven hundred fifty dollars)

*Membership fee reflects a \$250 early payment discount from the standard membership Azure level fee of \$15,000 based on the current student enrollment of 1607 students if paid in full no later than May 31, 2024.

Terms:
Payment is due no later than May 31st, 2024 in order to qualify for the \$250 early payment discount.

Summary of services provided:
Jeff Rice, doing business as APLUS+ shall provide an array of standard membership community awareness, consulting, networking, communications information, promotion, and public relations services to Excel Academy charter schools for the duration of the 2024-2025 school year as described in APLUS+ contract agreement and supplements.

Please make checks payable to APLUS+



the Association of Personalized Learning Schools & Services

Every Child’s Learning is Personal

CONTRACT SERVICES AGREEMENT

SERVICES OF CONTRACTOR

Jeff Rice, Director, and doing business as *APLUS+*, the Association of Personalized Learning Schools & Services (“Contractor”), hereby enters into an Independent Contractor Services Agreement with

Excel Academy (“Client”) and agrees to perform the services described in Exhibit “A” (the “Services”) attached to this Agreement.

Contractor will determine the method, details, and means of performing the Services.

Contractor may, at Contractor’s own expense, use employees or other subcontractors to perform the Services under this Agreement.

COMPENSATION

Client agrees to pay Contractor \$ 14,750.00 * _____ for the Services, as set forth below. See *APLUS+* Menu of Services and *APLUS+* Fee Schedule and Terms attached as Exhibit “A” and incorporated by reference into this Agreement.

Contractor shall be responsible for all expenses incurred in association with the performance of the Services.

TERM OF AGREEMENT

This Agreement will become effective on (date) July 1, 2024.

This Agreement is in effect for the duration of the 2024-2025 school year, scheduled to end on June 30, 2025, and will terminate on the completion of the Services or until terminated as set forth below. See *APLUS+* Menu of Services. (Exhibit “A.”).

Either party may terminate this Agreement at any time by giving thirty (30) days written notice to the other party.

Should either party default in the performance of this Agreement or materially breach any of its provisions, the non-breaching party may terminate this Agreement by giving written notification to the breaching party. Termination shall be effective immediately on receipt of the notice, or

APLUS+ CONTRACT SERVICES AGREEMENT
Page 2

five (5) days from mailing of the notice, whichever occurs first. For the purposes of this section, material breach of this Agreement shall include but not be limited to the following:

1. Nonpayment of compensation by Client after twenty (20) days written demand for payment.

This Agreement terminates automatically on the occurrence of any of the following events: (a) bankruptcy or insolvency of either party; (b) sale of the business of either party; or (c) death of either party.

RELATIONSHIP OF THE PARTIES

Contractor enters into this agreement as, and shall continue to be, an independent contractor. Under no circumstances shall Contractor look to Client as his/her employer, or as a partner, agent, or principal. Contractor shall not be entitled to any benefits accorded to Client's employees including worker's compensation, disability insurance, vacation or sick pay. Contractor shall be responsible for providing, at Contractor's expense, and in Contractor's name, worker's compensation for any Contractor employee engaged during the term of this agreement, or other insurance as well as licenses and permits usual or necessary for performing the Services.

Contractor shall pay, when and as due, any and all taxes incurred as a result of Contractor's compensation pursuant to this agreement. Contractor indemnifies Client for any claims, losses, costs, fees, liabilities, damages or injuries suffered by Client arising out of Contractor's failure to pay this specific tax obligation.

Consistent with this requirement, Contractor may represent, perform services for, or be employed by any additional persons, or companies as Contractor sees fit.

REPRESENTATIONS AND INDEMNITIES

Contractor represents that Contractor has the qualifications and ability to perform the Services in a professional manner, without the advice, control, or supervision of Client. Contractor shall be solely responsible for the professional performance of the Services, and shall receive no assistance, direction, or control from Client. Contractor shall have sole discretion and control of Contractor's services and the manner in which performed.

Contractor and Client shall and do hereby indemnify, defend and hold harmless each other, and their officers, directors, and shareholders from and against any and all claims, demands, losses, costs, expenses, obligations, liabilities, damages, recoveries, and deficiencies, including interest, penalties, and reasonable attorney fees and costs, that either party may incur or suffer that result from, or are related to any breach or failure of either party to perform any of the representations, warranties and agreements contained in this Agreement.

APLUS+ CONTRACT SERVICES AGREEMENT

Page 3

Contractor further agrees to maintain a general liability insurance policy in the minimum amount of \$1,000,000 to cover any negligent acts committed by Contractor or Contractor's authorized employees or authorized agents, if any, during the performance of the Services.

OWNERSHIP OF INTELLECTUAL PROPERTY

Contractor agrees that all designs, plans, reports, specifications, drawings, schematics, prototypes, models, inventions, and all other information and items provided to Contractor by Client during the course of this Agreement and arising from the Services ("New Developments") shall be and are assigned to Client as its sole and exclusive property. On Client's request, Contractor agrees to assist Client, at Client's expense, to obtain patents or copyrights for such New Developments provided by Client to Contractor, including the disclosure of all pertinent information and data, the execution of all applications, specifications, oaths, and assignments, and all other instruments and papers which Client shall deem necessary to apply for and to assign or convey to Client, its successors and assigns or nominees, the sole and exclusive right, title and interest in such New Developments. Contractor is not obligated to provide legal services to assist Client to obtain patents or copyrights. Contractor agrees to obtain or has obtained written assurances from its employees and contract personnel of their agreement to these terms with regard to Proprietary Information and New Developments.

The written, printed, graphic, or electronically recorded materials furnished by Client for use by Contractor are Proprietary Information and the property of Client. Proprietary Information also includes, but is not limited to, specific customer requirements, customer and potential customer lists, including information concerning Client's employees, agents or divisions, and pricing information.

Contractor will maintain in confidence and will not, directly or indirectly, disclose or use, either during or after the term of this Agreement, any Proprietary Information or confidential information or know-how belonging to Client, whether or not it is in written or permanent form, except to the extent necessary to perform the Services. On termination of Contractor's services to the Client, or at the request of Client before termination, Contractor shall deliver to Client all material in Contractor's possession relating to Client's business. The obligations concerning Proprietary Information extend to information belonging to customers and suppliers of Client about whom Contractor may have gained knowledge as a result of performing the Services.

Contractor shall not, during the term of this Agreement and for a period of two (2) years immediately following the termination of this Agreement, or any extension of it, for any reason, either directly or indirectly call on, solicit, or take away any of Client's customers or potential customers about whom Contractor became aware as a result of Contractor's Services to the Client, either for Contractor or for any other person or entity.

APLUS+ CONTRACT SERVICES AGREEMENT
Page 4

MISCELLANEOUS PROVISIONS

The attached APLUS+ Menu of Services and Fee Schedule and Terms (Exhibit A) is incorporated by reference and a part of this Agreement. Miscellaneous adjustments and/or provisions to this Agreement are as follows:

*Membership fee reflects a \$250 early payment discount from the standard membership Azure level fee of \$15,000 based on the current student enrollment of 1607 students if paid in full no later than May 31, 2024.

_____.

Notices and or demand shall be sent to each party at the following addresses until further notified in writing.

Contractor Contact Information:

Client Contact Information:

Jeff Rice, Director
APLUS+
18820 Lodestone Court
Penn Valley, CA. 95946

The foregoing is agreed to by:



Dated: 04/04/24 _____

Contractor

Dated: _____

Client



1121 L Street

•

Suite 1060

•

Sacramento

•

California 95814

•

TEL: 916 . 446 . 7517

•

FAX: 916 . 446 . 2011

•

www.sscal.com

MEMORANDUM

March 25, 2024

TO: Heidi Gasca, Executive Director
Excel Academy Charter School

FROM: John D. Gray
President/CEO

It has been a pleasure to provide Excel Academy Charter School with our Fiscal Budget Services during the past year. We value our relationship and appreciate the continued confidence that you and your staff have expressed in School Services of California Inc.

Our current contract expires on May 31, 2024. Anticipating your desire to continue our services, we have enclosed a proposed renewal Agreement. We are also offering the option to include our CADIE (Comparative Analysis of District Income and Expenditures) and SABRE (Salary and Benefit Reports) products as part of this contract. If you wish to include any of these services, please complete and sign the attached Addendum A, indicate the services desired, and return with your contract renewal. Any questions regarding the CADIE or SABRE should be directed to Chloe Lum, Systems Data Specialist (chloel@sscal.com).

To activate our Agreement, please sign the contract (and the Addendum, at your discretion) and *scan and e-mail* them to Mitch Hopkins at mitchh@sscal.com for final processing. So that we may continue to give you the best possible service, it would be helpful if we could have the Agreement returned by May 31, 2024. If you are unable to return it by this date, please contact our Accounting Department. Please note that this contract reflects a modest price increase above the current year.

If you have any questions or need additional information, please give me a call at (916) 446-7517.

Client # 0051380/S10

P.O. # _____

AGREEMENT FOR SPECIAL SERVICES
Fiscal Budget Services

This is an Agreement between the **EXCEL ACADEMY CHARTER SCHOOL**, hereinafter referred to as “Client,” and **SCHOOL SERVICES OF CALIFORNIA INC.**, hereinafter referred to as “Consultant,” entered into as of June 1, 2024.

RECITALS

WHEREAS, the Client needs assistance regarding issues of school finance, legislation, school budgeting, and general fiscal issues; and

WHEREAS, the Consultant is professionally and specially trained and competent to provide these services; and

WHEREAS, the authority for entering into this Agreement is contained in Section 53060 of the Government Code and such other provisions of California law as may be applicable;

NOW, THEREFORE, the parties to this Agreement do hereby mutually agree as follows:


1. The Consultant agrees to perform such duties relating to issues of school finance, including:
 - a. Electronic delivery of the *Fiscal Report* containing information on issues of school finance, budgets, or practices and policy issues that impact local educational agency fiscal policies, and an electronic copy of the *Analysis of the Governor's Proposals for the State Budget and K-12 Education*.
 - b. An analysis of all major school finance/fiscal legislation and reports on its legislative/executive branch progress
 - c. Ten hours of service annually as the Client directs on fiscal issues, including: analysis of specific revenue or expenditure issues, analysis of specific legislative or regulatory issues, and a “quick query” service to provide telephone response to specific fiscal questions of the Client.

Services for which the base service hours may not be used, include: mandate questions, Client-specific economy, efficiency, or management consulting services, including, but not limited to, efficiency or management studies, demographic or school facility studies; special education studies; fiscal health analysis, and/or an in-depth budget review, direct collective bargaining or factfinding assistance; legislative representation or advocacy; fiscal analysis for purposes of collective bargaining, appearance as an expert witness, provision of depositions or declarations for local educational agency legal issues; major customized research projects or studies; or, on-site speeches or presentations.
 - d. Participation at the Consultant’s school finance conferences and workshops at the Consultant’s client rate.
2. The Client agrees to pay to the Consultant for services rendered under this Agreement:
 - a. \$4,500 annually, plus expenses, for the services listed in Item 1 above, upon billing from the Consultant.

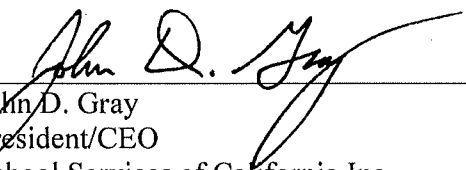
Agreement for Special Services—Fiscal Budget Services
EXCEL ACADEMY CHARTER SCHOOL

- b. For all requested services in excess of ten direct service hours as indicated in Item 1c above in a 12-month period, the applicable hourly rate for the person(s) performing the services shall apply.
 - c. “Hours” are defined as hours of direct service to the Client, as well as reasonable travel time to and from the Client’s site.
 - d. “Expenses” are defined as actual, out-of-pocket expenses, such as travel, meals, shipping, and duplication of materials.
3. The term of this contract shall be for the period of one year, beginning June 1, 2024, and terminating May 31, 2025. Agreement may be terminated prior to May 31, 2025, by either party on 30 days’ written notice. In the event that the Client elects to terminate services at the end of the Agreement, the Client shall give a 30-day written notice of nonrenewal. The Consultant will provide continuing services for 90 days after the expiration date of the Agreement or until the Client provides written notice. The Client is responsible for these accrued charges and the Consultant may bill these additional days. In case of cancellation, the Client shall be liable for any costs accrued to the date of cancellation under Item 2 above.
4. It is expressly understood and agreed to by both parties that the Consultant, while carrying out and complying with any of the terms and conditions of this Agreement, is an independent contractor and is not an employee of the Client.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed as indicated below:

By:  _____
3110C68C22BD4F9...
 Heidi Gasca
 Print Name
 Executive Director/CEO
 Job Title
 Excel Academy Charter School

Date: 4/10/2024 | 3:25 PM PDT

By:  _____
 John D. Gray
 President/CEO
 School Services of California Inc.

Date: March 25, 2024



Contract period: 06-01-24 to 05-31-25

P.O. # _____

**ADDENDUM A
TO SPECIAL SERVICES AGREEMENT**

As a client of School Services of California Inc., you have the option of purchasing either or both of our **CADIE** and **SABRE** reports at the client rate. The following information describes the **CADIE** and **SABRE** reports, and the form at the bottom of the page to order the reports.

The **Comparative Analysis of District Income and Expenditures (CADIE)** is a comprehensive computer-generated report comparing your district’s revenues and expenditures to those of 40 other districts (two reports with 20 districts in each) of your choice throughout the state. Well over 300 comparisons are made using SACS, CBEDS and CalPads data.

The **CADIE** includes comparative graphic data expenditures by ADA, tabular information showing per ADA and percentage distribution of district revenues and expenditures, staffing levels, and tables that show—on an ADA and percentage basis—how your district spent its dollars for the prior three years. The report is comprehensive, yet easy to use.

The **Salary And Benefits Report (SABRE)** is generated from the CDE’s Certificated Teachers Salary and Benefit data (Form J-90) and provides up to 38 side-by-side comparisons of your district with those of 40 other districts (two reports with 20 districts in each) of your choice on certificated salaries, health and welfare benefits, and work days.

The **SABRE** includes ten graphical displays and 27 comparison tables with side-by-side analysis for certificated non-management. It also includes the actual salary and benefit schedules and other selected data important for compensation evaluation in an easy-to-read format.

The analytical uses of the **CADIE** and **SABRE** reports are unlimited. If these products are needed for negotiations, they may be fully reimbursable as part of your mandated cost claim if you have chosen to file mandate claims for this year.

WITH REPORT PURCHASE, YOU ARE ENTITLED TO TWO CADIES AND TWO SABRES

Please check the appropriate items below: Current year 2022-23 Next year 2023-24**

Electronic Version:

___ CADIE only \$500
___ SABRE only \$350
___ CADIE & SABRE \$800

Hardcopy Version:

___ CADIE only \$600
___ SABRE only \$450
___ CADIE & SABRE \$1000

___ Use the same districts as last year
___ Use districts of similar type and size
___ Use districts geographically close to mine
___ Use districts with similar unduplicated pupil percentage

Reports are a year behind as the data is released by the CDE.

**Next year: SABRE will be released in December 2024, CADIE will be released in March 2025

District Name: _____

Contact Name: _____

Address (no P.O. boxes please): _____

Telephone with extension: _____

Email Address: _____

Signature: _____

Print Name: _____ Date: _____

By completing this Addendum A, and submitting with our contract, the Client agrees to pay for these reports upon receipt of the products and appropriate billing.

Coversheet

Consent - Education Student/Services

Section: XI. Consent
Item: B. Consent - Education Student/Services

Purpose:
Submitted by:

Related Material:

EACS Handbook-24_25 (1).pdf
EACS 2024-25 Handbook Revisions - May (1).pdf
_24_25 EACS SPED Handbook (1).pdf
EACS 2024-25 Sped Handbook Revisions.pdf
Combined MA for 2024-2025.pdf
Combined AOR 24-25.pdf
Excel Academy Charter Schools 24-25 Calendar (Revised 5_1) - 22-23 (1).pdf
Excel Academy (CA) - FlexPoint Hosted Per Student - June 2024_V1 (1) (1).pdf
Go Guardian 24-25 renewal quote.pdf
Goalbook 24-25 renewal quote.pdf
Presence Learning Kanga 24-25 renewal quote.pdf
Studies Weekly 24-25 renewal quote.pdf
IXL 24-25 renewal quote.pdf
Kami 24-25 renewal quote.pdf
EACS BUS - Subscriptions - May 2024.pdf
ExcelAcademyCharterSchool_TES_SOW_July2024-June2025 (1).pdf
ExcelAcademyCharterSchoolHelendale_TES_SOW_July2024-June2025 (1).pdf

BACKGROUND:

Item: University of California Transcript Evaluation Services Agreement

Background: **UC Compass**, formerly, "Transcript Evaluation Services", is an arm of the UC Regents and provides California school districts with A-G completion data, policy insights, and strategic planning support to improve student access to California's public colleges. They do this through bi-annual review of our a-g articulation data and our student records. Twice yearly, we would provide transcript reports for our high school students that are evaluated for 1) completer status 2) courses needed to attain completer status and 3) errors or improvement in our own articulation?SIS data. Their ability to do this deep dive will improve our a-g completion rate, identify holes in our a-g process, and alleviate data mining from our administrators and counselors. Student completers will have their data loaded directly into both the US and CSU application, alleviating error for students. Additionally, our school will be provided with completer data (both anticipated and retrospective) in the fall and spring, which will allow counselors to more accurately guide students and to use for LCAP renewal data.

The attached MOUs are required for the sharing of student data. The service is free for us because we are chartered in a member district.

Item: Master Agreement (MA) Revisions for 2024/25

Background: Minor revisions were made to the MA to update the Learning Period timeframe from 20 to 25 days for all academic paths. This also adjusted the timeframe from which assignments were given to when they were due from 20 to 25 days.

Item: Acknowledgement of Responsibilities (AOR) Revisions for 2024/25

Background: Minor revisions were made to the AOR to update the timeline for when in progress grades need to be uploaded after a student enrolls from 20 days to 25 days.



Excel Academy Charter School Handbook

2024-2025

Dear Parents and Students,

Thank you for choosing Excel Academy Charter School, a proud recipient of the prestigious California Distinguished School award. On behalf of the administration, teachers and support staff we want to welcome you to the 2024-2025 school year! We are honored to support you on your personal educational journey. As your Executive Director, I am humbled to serve you alongside an incredible team of dedicated educators and staff ready to collaborate as you begin the 2024-2025 school year! We recognize the sacrifice and dedication families make when committing to our school model which is why we strive to help create balance and parent choice in a personalized learning environment. Excel Academy is led by a collaborative team made up of innovative educators on the forefront of educational change.

Our school goals support our mission and vision providing 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.

We hope you will find this handbook helpful and use it as a tool to clarify procedures and expectations. Please never hesitate to reach out to your teacher of record or administration with any questions or concerns.

Excel Eagles~Let's continue to SOAR!

Sincerely,

A handwritten signature in black ink that reads 'Heidi Gasca'.

Executive Director

To view the Excel Academy Charter School handbook on our website, please [click here](#)

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Who We Are

Excel Academy is a tuition free, public charter school offering a personalized learning environment, offering three paths, for independent study and distance learning students in grades TK-12. Our unique educational program allows parents to select from a wide variety of educational resources and materials from approved content and community providers using instructional funds provided by the charter school. Our Virtual Path option allows students to learn directly from an Excel Academy Teacher in a distance learning model. Using these educational resources, families have the freedom to build a customized learning experience for their children, benefiting from flexibility of choice and the partnership of a highly qualified California-credentialed teacher.

Mission Statement

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



What we are all about: Our Vision

C

Compassion, Creativity ,
Collaboration, Challenge, &
Confidence.

H

Helpful, Hands-On , Humility,
& Happiness.

O

Optimism, Options,
Opportunities, Ownership, &
Others

I

Independence,
Individualization,
Inspiration, & Investigation

C

Child-focused , Curiosity,
Critical Thinking,
Consideration, & Community

E

Education, Equity,
Enjoyment. Exploration &
Empowerment

Schoolwide Learning Outcomes

Schoolwide Learning Outcomes (SLOs) are statements about what all students should know, understand, and be able to do by the time they graduate. To meet the demands of the 21st century, Excel Academy graduates will be:

Self-Directed, Critical Thinkers who

1. Produce quality work through multiple modalities
2. Organize and manage time efficiently
3. Demonstrate competency in active listening, reading, speaking and writing
4. Devise solutions in academic and real-world situations using higher-order thinking skills
5. Exhibit in-depth knowledge across disciplines
6. Reflect on and analyze learning experiences

Resourceful, Lifelong Learners who

1. Communicate effectively
2. Utilize personalization and a growth mindset to pursue individual passions and interests
3. Solve problems independently and collaboratively
4. Create and pursue personal, academic, and professional goals
5. Express ideas and information confidently and creatively
6. Employ technology to complement their knowledge

Respectful, Responsible Citizens who

1. Demonstrate college and career readiness upon high school graduation
2. Possess personal integrity and take responsibility for decisions and actions
3. Model respect for diverse cultures
4. Contribute as leaders within their community
5. Display a commitment to service
6. Develop a sense of personal accountability and dedication

Charter Authorization

Excel Academy Charter School is chartered by Warner Unified School District for the Orange, Riverside, and San Diego Counties, and Helendale School District for the Los Angeles and San Bernardino Counties: [Counties Served](#)

The strong connections and communication amongst the [authorizers](#) and the community foster a strong foundation for which our school is built.

WASC Accreditation

Excel Academy Charter Schools are accredited by the *Accrediting Commission for Schools, Western Association of Schools and Colleges*.

The *Western Association of Schools and Colleges (WASC)* is one of six regional associations, which accredit public and private schools, colleges, and universities in the United States. Accreditation certifies to other educational institutions and to the general public that an institution meets established criteria or standards and is achieving its own stated objectives. This means that all diploma or degree programs and educational activities offered by the institution are covered by the institution's accreditation.

What does Accreditation mean?

Accreditation certifies to other educational institutions and to the general public that an institution meets established criteria or standards and is achieving its own stated objectives. WASC and the other five regional associations in the United States grant "institutional accreditation" after a comprehensive self-study followed by an on-site evaluation of the programs and services of the total institution. This means that all diploma or degree programs and educational activities offered by the institution are covered by the institution's accreditation. The evaluation determines whether or not the institution qualifies for regional recognition. More importantly, periodic self-study and review promote improvement in educational quality and institutional effectiveness.

Why Consider Accreditation?

Having WASC accreditation has many benefits. When a school participates in WASC, it:

- Assures a school community that the school's purposes are appropriate and being accomplished through a viable education program. In other words, it is a trustworthy institution for student learning
- Validates the integrity of the school's program and transcripts
- Facilitates transfer of credits to other English-speaking schools — critical for college/university acceptance worldwide
- Provides a process for regularly examining programs, processes, and data around school goals and student learning through data analysis, reflection, inquiry, and dialogue
- Builds a professional culture to support the schoolwide action plan
- Fosters the continuous improvement of the school's programs and operations to support student learning
- Provides valuable insight from fellow educators visiting the school
- Benefits schools that choose joint accreditation or other collaborative processes

To remain accredited, a school must report annually on the progress of its submitted improvement plan as well as its ability to continue to meet accreditation standards. Once every five years, the school will need to engage in a thorough self-study process and will host a visiting accreditation team during the sixth year in the cycle. For more information, go to <http://www.acswasc.org/>.

Contacts

Parent Support

Parent support is available Monday through Friday from 8 A.M.–4:30 P.M. Please see the school directory below for department emails and contact numbers.

Contact Information

Our office is located at:
1 Technology Drive, Ste I-811
Irvine, CA 92618

Office Phone Number: (949) 387-7822

If you wish to reach a specific department by email, please use one of the following:

Admissions - admissions@excelacademy.education

Registrar - registrar@excelacademy.education

Student Services - studentservices@excelacademy.education

Intervention - tmurphy@excelacademy.education

Counseling - lallenjefferson@excelacademy.education & dfavela@excelacademy.education

Testing & Assessments - jcraig@excelacademy.education

Once enrolled, you will be provided with the contact information of your ToR Teacher of Record (ToR). If you are attempting to reach a member of our administrative staff, please call our Parent Support line and ask for the person with whom you wish to speak. We will be happy to connect you.

Special Education:

If your student has a current IEP, please contact their assigned Case Manager (“CM”) for support. You will receive contact information for your student’s CM prior to the first day of school.

If you have general questions about the Special Education Referral Process, please contact:

Intervention Coordinator - Tamara Murphy

PH: 951-290-2949

Or

School Psychologist - Noell Scott

PH: 949-382-1198

Enrollment

Recruitment and admissions policies, procedures, and activities are in compliance with state and federal law and are outlined in the individual charter petitions for each school.

Students will be considered for admission without regard to ethnicity, national origin, gender, disability or achievement level. Admission will not be determined according to the place of residence of the student or parents, except as required by law. Prior to admission, all parents must agree to and sign the Master Agreement. All students' continued enrollment shall depend upon them fulfilling the terms of the Master Agreement, Acknowledgement of Responsibilities (AoR), and Independent Study Policy. Enrollment space will be based on need in the community and availability of qualified, credentialed teachers to serve as the ToR.

Excel Academy will be non-sectarian in its programs, admissions policies, employment practices, and all other operations, shall not charge tuition, and shall not discriminate on the basis of race, ethnicity, national origin, gender, disability, or any other characteristic listed in Education Code Section 220 (or association with an individual who has any of those characteristics).

The application process begins on the Excel Academy website, where the parent or guardian will create a RegOnline account and will complete all steps of the application. The enrollment team will verify your application once **all documents have been uploaded and all electronic documents have been signed**. Our enrollment department will send you an acceptance letter once your application has completed and verified. Upon receiving that letter, families are encouraged to attend one of the All About Excel webinars or watch the recording. Once the family has decided what academic path they'd like their student to be on for the school year, they will email Admissions indicating their path preference.

Enrollment Documents Required

- Proof of Residency
- Birth Certificate
- Immunization Records
- Transcripts (high school only)
- Progress Report*

- Oral Health Report Form or waiver (TK, KN and 1st Grade only)
- Health Exam Form/Waiver (TK, KN and 1st Grade only)

**Please note: If a secondary student enrolls after 10 school days of start date, a progress report will be required.*

Private School Affidavit (PSA)

Students enrolling from a private homeschool setting will be required to submit all documents listed above. Additionally, placement tests will be required and administered by the Teacher of Record (ToR) for enrollment in certain secondary school courses.

Privately home-schooled students in 9th-12th grade enrolling in Excel Academy for semester two, please use the following: [PSA Transcript Summary](#).

Junior High students: Use the [PSA Transcript Summary](#) form for any math course (Algebra 1 or higher math) or world language course taken for high school credit.

Regardless of the number of transfer credits awarded, the student must successfully complete the required number of courses at Excel Academy in order to earn a high school diploma. (see [Graduation Track Options](#))

Grade-Level Assignment

At Excel Academy, students are enrolled in the grade that most closely corresponds to their age, in accordance with California State Law. Please see link below for Excel Academy's Grade Placement Chart: [Excel Grade Placement Chart 2024/2025](#)

Transitional Kindergarten (TK) Policy

TK is an option for the following students:

- Students who turn 5 between September 2-June 2
- Optional TK for Kinder Eligible Students
 - Students who turn 5 between June 1st-September 1st;
 - In this case, a Kindergarten Continuance Form must be signed, verifying that the parent/guardian agrees to have his/her child continue in kindergarten for one additional year.
 - Students may not be promoted from TK to 1st grade.

Kindergarten Placement

Students must turn 5 on or before September 1.

High School Grade-Level Placement

High school students are assigned a grade level based on the year of entry into 9th grade. Regardless of credit deficiency, students will be promoted to the next grade and given an opportunity to remediate credits in hopes that the student will graduate with his or her cohort.

In the event that a student does not graduate with their cohort, Excel Academy will provide the student an opportunity to continue their education, provided they are making adequate progress towards a diploma.

Adult Student Enrollment

Effective July 1, 2004 California State Law prohibits the enrollment of any student age 19 years or older who has not been continuously enrolled since their 18th birthday and making regular progress towards a high school diploma.

Dual Enrollment Policy – Public and Private Schools

In accordance with California Education Code Section 47602(b) and Title 5, California Code of Regulations Section 11965(a), no student may be enrolled in Excel Academy and simultaneously be enrolled in another public or private school. Private schools function outside the jurisdiction of the California Department of Education (CDE) and most state education regulations.

Acceleration & Retention: Policies & Processes

Acceleration

Students at Excel Academy will be promoted to the next grade level each year. Our general philosophy is that because Excel Academy offers personalized learning, acceleration is rarely necessary. For those rare exceptions, it must be agreed upon in writing, by both the parent and school administration, in order to skip a grade. Acceleration will only be considered prior to the beginning of the school year. Decisions regarding acceleration will be made on a case-by-case basis by the Acceleration Team. Typically, this is reserved for high school students who would like to graduate early. Students may graduate early, only if they have met all of the criteria for graduation, including credit requirements.

*In order to ensure sufficient time to observe the student in our academic setting, requests for grade acceleration will not be considered prior to enrollment with Excel Academy Charter School.

Acceleration Requests

1. Parents will send a letter to the Principal stating reasons why they are requesting acceleration.
 - a. Parents will provide any additional relevant information (i.e. report cards, transcripts, or assessment results received outside of EACS)
2. The Acceleration Team reviews information to determine if an acceleration meeting is warranted or if a decision can be made based on the letter.
 - a. If a meeting is warranted, it will be scheduled with the Parent and Acceleration Team.
3. A decision is made by the Acceleration Team and a decision letter is sent to the parent via email.

Retention

Students at Excel Academy will be promoted to the next grade level each year. Our general philosophy is that because Excel offers personalized learning, retention is rarely necessary. For those rare exceptions, it must be agreed upon in writing, by both the parent and school administration, in order to repeat a grade. Retention will only be considered prior to the beginning of the school year. Decisions regarding retention will be made on a case-by-case basis by the Retention Team. Students may not be retained more than once. Students will only repeat a grade in the case that there is substantial evidence the student lacks academic and/or emotional maturity.

*In order to ensure sufficient time to observe the student in our academic setting, requests for grade retention will not be considered prior to enrollment with Excel Academy Charter School.

Retention Requests

1. Parents will send a letter to the Principal stating reasons why they are requesting grade retention.
 - a. Parents will provide any additional relevant information (i.e. report cards, transcripts, or assessment results received outside of EACS)
2. The Retention Team reviews information to determine if a retention meeting is warranted or if a decision can be made based on the letter.
 - a. If a meeting is warranted, it will be scheduled with the Parent and Retention Team.

3. A decision is made by the Retention Team and a decision letter is sent to the parent via email.

8th Grade Retention & Promotion

State law requires schools to have promotion and retention criteria for students who are in their last year of junior high (*EC* Section 48070.5[a][5]). Therefore, Excel Academy will identify students who are at-risk of being retained in 8th grade (*EC* Section 48070.5[b]). Excel Academy will use i-Ready scores as its main source of data. Based on those results, additional assessments may be administered, to determine an 8th grader's readiness for high school.

Steps Excel Academy will take if a student is found to be at-risk for 8th grade retention:

- Parents will be notified in the fall of 8th grade, or once the i-Ready assessment is complete for mid-year enrollees.
- The student will participate in additional progress monitoring & individualized academic intervention throughout their 8th grade year.
- The spring i-Ready assessment will be used as a main source of data for final 8th grade retention or promotion recommendations.
- For those students who continue to be at-risk for retention in the spring of 8th grade, Retention Review meetings may be held with the parent and Excel Academy administration. Excel Academy will make the final determination based on data collected.

Student with an Expulsion History

For students who seek admission at Excel Academy with expulsion history, please refer to the expulsion policies for our authorizing districts (Helendale Elementary and Warner Unified School District). A panel will meet to determine whether the pupil does not pose a threat to others or will be disruptive to the school environment. The Executive Director or designee shall make a recommendation to the governing board following the meeting regarding his or her determination.

Master Agreement

The Master Agreement is a binding agreement between Excel Academy, the student, the parent/guardian, the supervising ToR, and other team members responsible for the student's educational progress. The agreement documents assigned courses as well as the time, manner, and frequency of the student's meetings with the faculty. In addition, the Master Agreement addresses specific resources including materials and personnel that will be made available to all

students, academic and other supports, missed assignments, satisfactory progress and required parent communication to address pupils not generating attendance. Each agreement can be signed prior or up to the first day of the student's attendance start date.

Methods of Operation and Glossary of Terms

Learning Options

Excel Academy Charter School strives to meet the educational needs of the whole child. Our Academic Paths allow families to choose the model of education that best works for the needs of the student and parent. Our Academic Path options include:

- Personalized Elementary
- Personalized Secondary
- Virtual Path

Personalized Elementary (TK-6)

In this path, students are educated through flex-based instruction, where the parent/guardian is the primary instructor, and the Excel Teacher of Record (ToR) oversees the student's education. Parents are able to choose from a selection of standards-aligned curriculum options based on the specific needs of their student (Curriculum can include textbook and online options). 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. 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 Learning Period (LP). TK-6th grade students meet with their ToR each LP on an alternating schedule (in-person and virtually)

Personalized Secondary (7-12)

In this path, students are educated through flex-based instruction, where the parent/guardian is the primary instructor, and the Excel Teacher of Record (ToR) oversees the student's education. Parents are able to choose from a selection of standards-aligned curriculum options based on the specific needs of their student. Curriculum can include textbook and online options. Additionally, Excel Teacher-Led courses provide the option for students to enroll in hybrid courses which consist of an asynchronous, online curriculum which is supported with live, online teaching. Each student's curriculum is paced out by the ToR for the school year, with clear expectations for what the student is to complete each Learning Period (LP). The ToR, parent/guardian, and student will meet together to review the student's body of work and academic progress at the end of each LP. 7th-12th grade students meet with their ToR monthly for their LP meeting. These meetings may be in person or online. Students and families must meet with their ToR once each semester in person, in the fall and in the spring. This in-person

meeting requirement may be met during a Learning Period meeting, a field trip, or a school event.

Virtual Path (1-8)

In this path, students learn in a virtual classroom setting with a group of their peers three days a week, receiving instruction in all core subjects. The other two days of the week, students check-in briefly with their teachers and work independently on their school subjects for the remainder of the day.

- Direct instruction provided by a credentialed Virtual Teacher
- 100% Virtual Learning and Meetings
- Classrooms split by grade level for 1st-6th, and by subject for 7th and 8th
- Regular connection with peers in an online platform
- Quality, standards-aligned curriculum, assigned by the teacher

Note: Fast, reliable internet service is required for the Virtual Path.

General Terms

Acknowledgment of Responsibilities (AoR) - A document that lists the responsibilities of Excel Academy parents/guardians and their students. The AoR is sent via email link, along with the Master Agreement (MA), for parents to sign upon enrollment.

Behavior Improvement Plan (BIP) - A BIP serves as a follow-up to address any areas where your student may need a restorative plan of action and/or support to redirect current behavior.

Daily Attendance Grid Log -Each day a student participates in an educational activity, parents will be asked to go into the parent portal to mark attendance.

Art & Music Enrichment- Weekly engagement “classroom style,” via Zoom, 30 minutes daily by the Virtual Art and Music teachers.

Eagle’s Nest - Weekly updates sent out every Friday afternoon via Beehively for all families regarding opportunities, programs, classes, activities, etc., that are coming up.

ETL (Excel Teacher Led) Courses- Excel Academy’s courses that are offered to students in junior high and high school (or in Eagle Secondary). The courses are virtual in nature and intended to offer students the opportunity to participate in a class setting with a credentialed teacher.

HQT (Highly Qualified Teacher) Content Area Specialist - The HQT Content Area Specialist's ultimate responsibility is to ensure the success of each high school student at Excel Academy. The HQT teacher works closely with the student, parent, and ToR providing single subject expertise in CORE subject areas.

Instructional Funds (IFs) - State funds are allotted to each student. Families may request the purchase of approved educational materials and services through Excel Academy.

Learning Period (LP) - The intervening days between each LP meeting, ranging from (13 - 25) school days.

Master Agreement (MA) - An enrollment agreement between the parent/guardian, school, and ToR which specifies the policies and procedures that must be followed to participate in Excel Academy. An MA signed by all parties, in conjunction with the AoR, is necessary for enrollment in the school.

Progress Improvement Notification (PIN) - A PIN serves as a follow-up to address any areas where your student may need additional support.

Teacher of Record (ToR) - The ToR is a credentialed teacher (single subject or multiple subject) who works with his or her assigned family to identify, support, and implement a personalized learning plan for the student on the Personalized Elementary or Personalized Secondary path.

Virtual Path - An academic pathway option for students in 1st-8th grade. In this path, students learn in an online classroom with a group of their peers three days a week, receiving instruction for all core subjects by their assigned teacher. On the other two days of the week, the student will check in briefly with their teacher and will work independently on their school subjects.

Virtual Teacher - The Virtual Teacher is a single or multiple subject credential-holding teacher who services students in the Virtual Path. They serve as the classroom teacher for students and provide daily, direct instruction to students in an online environment.

Student Services Department Terms

CCP - Content and Community Provider

EMR- Educational Materials

VCI- Educational Services

OPS- Online Purchasing System. The system used at Excel Academy 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 ToRs to communicate about a specific order.

Consumable Items- Items that (A) are under \$50 and/or (B) cannot be reused by another student. Examples include: workbooks, pens, paper, pencils, printer ink, etc.

Non-Consumable items- Items that (A) are over \$50 and/or (B) can be reused by another student. Examples include: Textbooks, CD/DVDs, electronics (laptop, iPad, printer).

Purchase Order Status Terms: Purchase order status refers to the stages of a purchase order from first placement by the family through to the payment of the purchase order.

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 processed by Student Services (for VCI this is on the 20th of the month prior to services) and sent to the CCP for fulfillment. VCI CCP will now be able to view Purchase orders in their OPS portal and process for payment at the end of the month of service. EMR orders will be sent to the CCP for fulfillment and shipping.

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 CCP and matched the order in OPS to match what the CCP is charging.

Methods of Operation

Body of Work

For Personalized Path Students only: A body of work should reflect 15-25 days of learning, depending on the length of the Learning Period. A pacing guide is provided for each subsequent Learning Period to assign the learning for each subject area for grades TK-8 and for each course

in grades 9-12. . All work should be graded or evaluated by the home educator and/or from the service provider. At each LP meeting, the ToR will collect a generous sampling from the body of work in each subject/course that is an accurate representation of the student's mastery and work completed. Formative assessments may be requested to validate any learning which occurred during the respective LP. The ToR will file these samples as proof of student daily attendance and progress.

Student Pacing and the Assessment of Learning

For Personalized Path Students only: The ToR will provide a pacing guide for all curriculum content in a student's Course of Study before each LP begins. The ToR will review the body of work completed by the student throughout the LP and engage in academic conversation which may include a formative assessment process to confirm content mastery. Progression through the assigned curriculum content will be verified by the ToR on a weekly basis. If a student fails to complete at least 70% of the pacing guide per subject/course assigned by the ToR, a PIN may be issued. Grades are discussed on a monthly basis during the LP. Final grades assigned at the end of the semester are based on the student's progress towards meeting grade-level standards..

Final grades for high school students taking any course for which a transcript is required will be at the discretion of the course teacher and are considered final. Final grades for high school students taking any concurrent college course will be at the discretion of the college instruction. Families are responsible for requesting the official transcript, and grades in college courses are not posted to the student's high school transcript until the Registrar receives the official transcript. If a family does not submit this transcript, and the course is needed for graduation credit, the student will be responsible for working with the ToR and the Counselor to determine an alternative class to complete for credit.

Attendance Roll Sheet/Grid Log

Along with the assessment and pacing of student work, another responsibility of the ToR is to verify and claim attendance for each LP. Daily attendance is recorded for each school day a student participates in an educational activity. The ToR will verify that ample work was completed by the student after reviewing the daily attendance claimed, participation in educational activities, and the student's work. Following this confirmation of work completed, the ToR and parent/guardian will sign and date the electronic Attendance Grid Log for each LP.

Progress Improvement Notification (PIN) and Identified Assignments

In order to remain enrolled at Excel Academy, the responsibilities outlined in the Master Agreement, Independent Study Policy, Acknowledgement of Responsibilities, Involuntary Withdrawal Policy, and Civility Policy must be followed. Within these policies, the process for which a student may be involuntarily withdrawn from Excel Academy is outlined. Part of that

process includes the issuance of Progress Improvement Notifications (PINs) when a student fails to complete identified assignments key to a student's success in the independent study environment or any other responsibilities outlined in the EACS Handbook, Acknowledgement of Responsibilities, and Master Agreement. These identified assignments include, but are not limited to, completion of assigned work (CORE, ELD, WIN), internal assessments, attendance at mandatory meetings, and other key responsibilities outlined within the Excel Academy Board Policies and EACS Handbook.

Behavior Improvement Plan Process

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 expulsion from Excel Academy.

For students who commit violations such as [academic dishonesty](#), inclusive of forms of AI usage, 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, writing a letter of apology, rewriting an assignment in question, removal from extra-curricular opportunities, removal from the National Honor Society, and/or an in-school suspension.

Plagiarism is considered a form of [academic dishonesty](#) and therefore a violation of behavioral expectations and standards. For students who commit plagiarism, the following will occur:

1. The first offense will result in a zero on the assignment until the behavior is corrected with an opportunity for an improved grade.
2. If a second offense occurs, the student will receive an F/zero on the assignment in question. The student will correct the mistake without a grade increase. The zero for the assignment will remain..
3. If a third or subsequent offense occurs, the following consequences will be enacted:
 - Students in grades TK-6: These offenses will be dealt with on a case-by-case manner.
 - Students in 7th and 8th grade: MTSS supports will be required and individualized based on the student's curriculum and needs.
 - Student in high school: These students will be removed from the course 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.

For a list of what constitutes plagiarism, please refer to the Academic Integrity Policy.

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 list of offenses and 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.

Eagle's Nest & School Newsletter

One of the main avenues of communication to our parents is through our weekly Eagle's Nest, an update of all of the coming opportunities, classes, clubs, and deadlines, sent via the Excel Academy communication platform, Beehively. Additionally, our School Newsletter is sent out on a monthly basis as well. Parents often receive time-sensitive communication, information about community events, deadline reminders, and community provider spotlights through the monthly newsletters. ***Please let your ToR know if you are not receiving one of these critical forms of communication: the weekly Eagle's Nest, monthly School Newsletters and/or updates through Beehively.***

Meeting Types

Attendance Intervention Meeting (AIM)

A meeting that occurs after a student receives their second PIN. The purpose of the AIM will be to review requirements of independent study and the responsibilities of the student and the home educator. During this meeting, families are encouraged to consider the independent study program's impact on the pupil's achievement and well-being, consistent with the evaluation for satisfactory progress as defined by the board policy. If the student and

parent/guardian elect to stay enrolled, the team will develop a plan to help support the student to make satisfactory educational progress, including additional resources and supports.

Initial Contact Meeting

For students participating in the Personalized Paths, once a ToR has been assigned to a family, they will reach out to schedule an introductory meeting. During this meeting, the ToR will explain the school requirements and go over curriculum options. For more information on learning styles and curriculum options, please click [here](#) to visit the Excel Academy website. Parents/Guardians must provide their ToR with their curricular choices that cover grade-level content standards within 5 days of a student's start date with Excel Academy. If the parent/guardian fails to decide upon curricula that cover grade-level content standards within the 5 day window, the ToR will order the student curricula from Excel Academy's grade-level recommendations.

Learning Period (LP) Meetings

Learning Period (LP) meetings are a critical part of the Personalized Paths at Excel Academy. For grades TK-6, students meet with their Teacher of Record each Learning Period on an alternating schedule (in-person and virtually). For grades 7-12, students meet with their Teacher of Record at least once in person each semester. New students will meet with their ToR in person on or before the third Learning Period. In-person meetings take place at a mutually agreed upon public location. LP meetings are held approximately every 15- 25 school days. During the meeting, the ToR communicates with the student to gather information and knowledge learned throughout the LP. Due to the importance of these meetings, and out of respect for our ToRs, we ask that families keep the agreed upon location and time of their LP meeting, with the exception of unforeseen emergencies. Additionally, parents who do not attend LP meetings as scheduled may be subject to Progress Improvement Notifications (PINs) (See our [Outline of Violations that May Result in Involuntary Withdrawal](#)).

Parent-Teacher Conferences

Families enrolled in the Virtual Path do not attend Learning Period (LP) meetings. Instead, parents/guardians are updated weekly on class assignments and expectations, as well as student work completion. Additionally, parent-teacher conferences are scheduled to discuss academic progress and set a positive course for learning. If parents would like a conference outside of a scheduled conference time, they may request one by emailing the classroom teacher. Parents/guardians who cancel or miss a parent-teacher conference will be subject to a Progress Improvement Notification (PIN), which may lead to Involuntary Withdrawal. (See our [Outline of Violations that May Result in Involuntary Withdrawal](#)).

Virtual Path Expectations

All students participating in the Virtual Path need a strong, reliable internet connection in order to participate in class each day. Students who do not have a strong, reliable internet connection may wish to enroll in Excel Academy's Personalized Path, which does not require daily streaming.

All students enrolled in the Virtual Path will be issued a school Chromebook. The Chromebook must be accessed using the student's school gmail account. Students are not permitted to use a personal computer or tablet to join a class session. Should the Chromebook stop working, please notify the school immediately, so that a replacement can be issued as soon as possible. Students are responsible for treating all school-issued technology with care and may be required to pay for any technology that is damaged.

The [Virtual Path Learning Schedule](#) provides families with the schedule for each grade level classroom. Students are required to attend class, on time and for the entirety of the class session, as listed on the schedule. While students are welcome to participate in school sponsored field trips, they must have prior approval from their classroom teacher and be in good academic standing should the field trip fall during a scheduled class time. Enrichment classes, whether offered through a CCP or the school, can be attended by Virtual Path students only if they fall outside of regular class hours.

While class is in session, students must have their web cameras on and focused on their face. All other electronics including cell phones, computers and gaming equipment should be out of sight of the student. It is the responsibility of the parent/guardian to make sure students are engaged in class, with no other browsers or screens open. Headphones are highly recommended for all students in the Virtual Path, in order to provide a quiet learning environment. (Student instructional funds can be used, if needed.) Additionally, a student's learning area should be free from other family members or individuals that might be a distraction to the student and/or their classmates.

Communication and teamwork between the classroom teacher and the parent/guardian is key to ensuring student success in the Virtual Pathway. Because of its virtual nature, teachers depend on the parent/guardian to ensure students can login to class sessions and the online learning platforms. Parents/guardians also must be sure students complete and submit all assigned work by its due date each week. The assigned learning, as well as any other important updates or announcements will be sent to parents/guardians in a weekly email from the classroom teacher. If there are concerns regarding a student's learning or progress, it will be communicated as well. Parents/guardians are expected to read all school communication thoroughly to make sure students are adequately prepared for the upcoming week. Worksheets and printables must be printed and within student reach by the first class session each week.

The parent/guardian is expected to prepare students for the school week by:

1. Gathering all materials, manipulatives, and/or components necessary for class lessons, as outlined by the classroom teacher. (This may include printing and organizing student worksheets, gathering science materials, pencils, glue, erasers, rulers, etc.)
2. Ensuring student completion and submission of all assignments, including any outstanding work for which they have been given an extension.

Additionally, parents/guardians should:

1. Be available during class to immediately address any emergencies or behavioral issues that arise. (Be sure all updated telephone numbers and emails are on file with the school.)
2. Review student grades and progress in the learning system regularly

Questions/Concerns: If a parent/guardian has a concern regarding a classroom teacher, or something that occurs during class, it must be addressed in a private setting after class is over. Parents/guardians are not to interrupt a class session in order to voice a concern.

Curriculum Access Using BUZZ

Much of the student learning in the Virtual Path is accessible through the “BUZZ” LMS. BUZZ is easy to use, once you get the hang of it. As a parent/observer, you will help to ensure your student is completing their assignments at home, so it is critical that you know how to login and access everything. Please use the learning tools below to learn how to use BUZZ as a student or parent/guardian/observer.

[User Manual-Student](#)

[User Manual-Parent/Observers](#)

Virtual Classroom Access

Classroom links are made available to students once the Master Agreement is signed and students are completely onboarded. The link provided by the classroom teacher is not to be shared and should only be used by the student while participating in the virtual classroom

School Policies, Procedures & Regulations

School Safety Plan

Excel Academy seeks to provide a safe environment for its students, parents, staff, ToRs, and administration. For more information on Excel’s emergency procedures and policies, please review our comprehensive safety plan [here](#).

School Communication Responsibilities

It is pertinent that we are able to communicate effectively with our families due to the remote nature of our school. The school requires that all parents reply to communication from Excel Academy staff and Teachers of Records within 48 hours (2 business days). We also require 24 hours notice in the event a parent must cancel an Excel Academy appointment, including but not limited to: LP meetings, IEPs, SPED provider appointments, and Student Success Team (SST) meetings. Please note: Students are allowed two changes to appointments per school year before being subject to a PIN. Additionally, if a student/parent cannot be reached by Excel Academy staff for 10 business days or more, an evaluation will take place to determine whether it is in the best interest of the pupil to remain in independent study. If the evaluation finds that it is not in the student's best interest to remain in independent study, the student may be involuntarily withdrawn. (Please refer to Outline of Responsibilities that May Result in Involuntary Withdrawal section for further details).

Email or voicemail sent to administrative personnel Monday through Thursday between 8:00 am and 5:00 pm Pacific Time (PT) will be addressed within twenty-four (24) to forty-eight (48) business hours of the time it was sent. Email or voicemail sent between 8:00 am and 5:00 pm PT the day before a weekend or holiday will be addressed on the next business day. Email or voicemail sent during non-office hours will be addressed within twenty-four (24) to forty-eight (48) hours of the beginning of the following business day. Instructors who are scheduled to be away during regularly scheduled office hours (for professional meetings or vacation) will post the dates and times of those interruptions at least forty-eight (48) hours in advance and will offer alternative contact information for assistance. Unanticipated absences due to illness or other emergencies will be reported to the Principal Director who will find suitable alternatives for assistance.

Email Accounts

A valid, working email account is required for all Teachers of Record and parents, and is provided to students for optional use. Parents and students must provide contact information, which can include email, phone number, and mailing address. If a Teacher of Record, student, or parent/guardian's email address, mail address, IM address, or phone number changes, it must be updated with Excel Academy Admissions at admissions@excelacademy.education within five (5) business days. In case of an emergency, it is important that this information is kept current.

Excel Academy disperses student email accounts to every Excel Academy student. This email account will be available to the student as long as they are enrolled at Excel Academy. Please

contact your Teacher of Record if you have not received your student email account login info to request an email account and he/she will contact the Senior Communications Coordinator to get it set up. For another option, students who need a separate email account from their parents/guardians can sign up for a free account with Yahoo, Gmail, or Hotmail. Please note, however, that Excel Academy does not have any relationship with these third parties, and it is not responsible for the availability or content of marketing or other materials on the above third parties' websites. The providers of the websites may discontinue their free programs at any time at their discretion.

Phone and Text Communication

Personal Social Media and Instant messaging Communication by phone or text/instant messaging to Teachers should be only for urgent matters and only during the hours of operation (Monday-Friday 8:00 am-4:30 pm.) All informational communication by the school will be through Beehively, email, the Excel Academy website, and/or EACS social media accounts

Tone of Contact

Students and parents/guardians must use school appropriate language in communication with Excel Academy employees and peers. Students and parents/guardians will not partake in cyber-bullying or any form of harassment. Students should strive to use appropriate grammar and capitalization in their written communications.

Authorized Contacts

At the time of enrollment, a student's parent/guardian is asked to approve any contacts that have authorization to receive performance information about the student. Individuals with authorization are responsible for maintaining current contact information with the school. In accordance with FERPA law, school officials are only authorized to speak to parents/guardians that are listed at the time of enrollment and who possess educational rights. The Registrar should be notified of any changes in custody or educational rights immediately.

Internet/Computer System Acceptable Use Policy (AUP)

Excel Academy provides technology resources to its students solely for educational purposes. Through technology, the schools provide access for students and staff to unlimited resources. Expanding technologies provide tremendous opportunities for enhancing, extending, and rethinking the learning process. The goal in providing these resources is to promote educational excellence by facilitating resource sharing, innovation, and communication with the support and supervision of the parent and credentialed teacher.

With this access brings the potential exposure to material that may not hold educational value or may be harmful or disruptive to the student's learning experience.

The purpose of this policy is to ensure that student internet access on school-owned computers will be appropriate and used only for educational purposes, consistent with the acceptable standards of the school.

All computer equipment, programs, supporting materials, and peripherals of any nature which the student receives from the school are loaned to the student for educational purposes only and belong to the school. As a condition of receiving and using any such equipment, the student and parent/guardian acknowledge that there is no right or expectation of privacy whatsoever related to the student's use of such equipment. The school retains the right to monitor, at all times, internet/computer activity accessed by this equipment, review any material stored in files on such equipment, and edit or remove any material which the school staff, in its sole discretion, believes violates the above standards, and terminate the Internet/Computer Agreement of any persons violating the conditions set forth in this policy.

Information services, such as online educational resources provided by the school, may occasionally require new registration and account information to continue the service. This will require the school to give out certain portions of a student's personal information to one or more 3rd party content and community provider(s) required for this requested service, such as login information, etc. Student and parent/guardian signatures of this policy and the use of aforesaid computer equipment or school-provided online resources indicate specific consent to such release of personal information.

Students using the internet shall be closely supervised by the parent. Students and their parents/guardians are ultimately responsible for the materials accessed through the use of student internet accounts. Parents/guardians will be responsible for the supervision of students using the internet.

The California Computer Crime Bill (1979) added section 502 to the Penal Code making it a felony to intentionally access any computer or system or network for certain purposes, including:

- Devising or executing any scheme or artifice to defraud or extort
- Wrongfully control or obtain money, property, or data
- Knowingly accesses and without permission adds, alters, damages, deletes, or destroys any data, computer software, or computer programs which reside or exist internal or external to a computer, computer system, or computer network
- Knowingly and without permission accesses or causes to be accessed any computer, computer system, or computer network

- Knowingly introduces any computer contaminant into any computer, computer system, or computer network

*Anyone committing acts of this kind, or any other actions prohibited by law with school owned computers and/or equipment will face legal action and disciplinary procedures.

It is the intent of this policy to protect students from inappropriate information. However, the staff cannot screen all of the materials available on the internet. Willful access to inappropriate material in any form by students as well as the importation of any material from “outside sources” on school owned computers and/or equipment is a violation of this policy and may result in disciplinary action including, but not limited to, the revocation of school-provided computer and/or equipment and/or discipline, up to and including, expulsion of the student. Students, staff and parents/guardians hold a joint responsibility to ensure that inappropriate material is not displayed or available on any computer.

Parents/guardians will teach the student about internet safety, including how to protect online privacy and how to avoid online predators using resources such as materials available at:

<http://www.digitalcitizenship.net>.

Excel Academy has also adopted internet safety policies in accordance with applicable law, including the Children’s Internet Protection Act, which will be provided to parents/guardians.

This policy does not attempt to articulate all required or proscribed behavior by users. Misuse may come in many forms; it is commonly viewed as any transmission(s) sent or received that suggest or indicate pornography, unethical or illegal solicitation, racism, sexism and inappropriate language.

Unacceptable behaviors may include, but are not limited to, the following:

- Using the school funded internet/computer system for illegal, inappropriate, or obscene purposes or in support of such activities.
- Utilizing the school funded internet/computer system for any illegal activity including violation of copyrights or other contracts relating to licensed uses.
- Intentionally disrupting equipment or system performance.
- Downgrading the equipment or system performance.
- Damaging or misusing any hardware or software.
- Utilizing the school’s computing resources for commercial/financial gain or fraud.
- Pirating and/or theft of data, equipment, or intellectual property.
- Gaining or seeking to gain unauthorized access to resources or entities.
- Utilizing the system to encourage the use of drugs, alcohol or tobacco or any promotion or attempt to promote any unethical behavior.
- Using harassing, abusive or obscene language.

- Annoying, harassing or intentionally offending another person.
- Introducing computer viruses into the system.
- Forging electronic mail messages or using an access owned by, or used by another.
- Wasting of resources.
- Invading the privacy of others.
- Possessing data in any form (including hard copy or disk) which might be considered a violation of these rules.

Zoom Disclaimer

The purpose of the Zoom Disclaimer is to build trust, respect and have safeguards in place for students to abide and adhere to the guidelines set forth by the school. The goal is to prevent Zoom violations from occurring in our school organization by:

- Protecting data, student privacy and IT Security.
- Protecting students and staff from Cyberbullying, Abuse, Threats and Sensitive Content.
- Protecting unauthorized access data loss protection against security breaches and impersonating.
- Protecting unauthorized disclosure and dissemination of data from cybersecurity attacks.

When taking part in online Zoom meetings, the following considerations must be observed and adhered to:

- By accepting the Zoom meeting ID and joining the meeting you agree to the terms set out in this document and [Zoom Acceptable Use Guidelines](#).
- Participants should be dressed appropriately.
- The meeting ID is to remain confidential and not to be shared to anyone that it was not designated to.
- Recording, photos or screenshots of the Zoom meeting are not allowed by participants.
- For participants some Zoom facilities will be disabled by the host teacher. This includes but is not limited to the screen record function, chat and screen share.
- [Zoom Acceptable Use Guidelines](#) apply to Zoom meetings, and the teacher retains the right to terminate a meeting or a specific student's attendance in the event a violation of the above has occurred.
- Students must adhere to the Internet/Computer System Acceptable Use Policy as outlined above.

Student Freedom of Speech / Expression

Excel Academy believes that free inquiry and exchange of ideas are essential parts of a democratic education. We respect students' rights to express ideas and opinions, take stands on issues, and support causes, even when such speech is controversial or unpopular.

Students shall have the right to exercise freedom of speech and of the press including, but not limited to: (1) use of bulletin boards; (2) distribution of printed materials or petitions; (3) wearing of buttons, badges, and other insignia; and (4) right of expression in official school publications. "Official school publications" refers to material produced by pupils in the journalism, newspaper, yearbook, or writing classes and distributed to the student body either free or for a fee. The school lead/director or designee will supervise the material produced by pupils to ensure it meets professional standards of English and journalism.

Students' freedom of expression shall be limited as allowed by Education Code Section 48907, and other applicable state and federal laws. Students are prohibited from making any expressions or distributing or posting any materials that are obscene, libelous, or slanderous. Students also are prohibited from making any expressions that so incite students as to create a clear and present danger of the commission of unlawful acts at school-sponsored activities or events, the violation of school rules, or substantial disruption of the school's orderly operation. The use of "fighting words" or epithets is prohibited in those instances where the speech is abusive and insulting, rather than a communication of ideas, and the speech is used in an aggressive or abusive manner in a situation that presents an actual danger that it will cause a breach of the peace. A student shall be subject to discipline for out-of-school expression, including expression on internet websites, when such expression poses a threat to the safety of other students, staff, or school property, or substantially disrupts the educational program.

Civility Policy

School personnel, parents, guardians, and students are required to be civil in all of their interpersonal school-related interactions. Civility does not require unqualified agreement or conformity of opinion. An expression of disagreement or a discussion of a controversial viewpoint is not uncivil if such expression or discussion is appropriately and respectfully presented and does not disrupt a school-related activity.

For purposes of this policy, to be civil means to act with self-discipline in a courteous, respectful, and orderly way in every interpersonal communication and behavior, either in person, electronically, or online with the goal of providing a safe and harassment free environment for our students and staff while maintaining individual rights to freedom of expression.

Examples of uncivil conduct includes, but is not limited to:

- a. Using an inappropriately loud voice;
- b. Using profane, vulgar, or obscene words, gestures and/or online language/images;
- c. Belittling, jeering, or taunting;
- d. Using personal epithets;

- e. Using violent or aggressive gestures or body-language;
- f. Repeatedly and inappropriately interrupting another speaker;
- g. Repeatedly demanding personal attention at inappropriate times;
- h. Purposefully and inappropriately invading personal space;
- i. Purposefully ignoring appropriate communications;
- j. Wrongfully interfering with another person's freedom of movement;
- k. Wrongfully invading another person's private possessions; or;
- l. Any other behavior that inappropriately disrupts school-related activities.

In the event that any party is uncivil during a school-related activity, the following steps will occur:

1. **Communicate** - The party experiencing the uncivil behavior will communicate that the behavior is not civil and that the uncivil behavior must cease immediately.
2. **End Activity/Meeting** - If the uncivil party fails to correct the uncivil behavior as directed, the affected party shall end the activity/meeting.
3. **Referral** - The reporting party shall refer the situation to school administration with a written summary of the uncivil behavior and how he/she responded.
4. **Determination** - If it is determined that uncivil behavior occurred, proper disciplinary action will be taken, which may include suspension, expulsion and/or involvement with law enforcement or county and community services as needed.

Bullying

Excel Academy recognizes the harmful effects of bullying, hazing, or other behavior that infringes on the safety and well-being of students or interferes with learning or teaching. We desire to provide a safe school culture that protects all students from physical and emotional harm. Student safety is a top priority, and the school will not tolerate discrimination, harassment, intimidation, or bullying of any kind of any student.

“Bullying” means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a pupil or group of pupils directed toward one or more pupils that has or can be reasonably predicted to have the effect of one or more of the following:

- Placing a reasonable pupil or pupils in fear of harm to that pupil’s or those pupils’ person or property.
- Causing a reasonable pupil to experience a substantially detrimental effect on his or her physical or mental health.
- Causing a reasonable pupil to experience substantial interference with his or her academic performance.

- Causing a reasonable pupil to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by a school.

“Electronic act” means the creation or transmission of a message (*e.g.*, a text message, sound recording, video, image, social media post, etc.) by means of an electronic device, including, but not limited to, a telephone, computer, tablet, pager, or other communication device.

Bullying that occurs outside of school but negatively impacts the school environment or ability of a student to perform in school is considered bullying. Violations of our zero tolerance policy on bullying will result in a BIP and may lead to discipline up to and including suspension and/or expulsion.

Academic Integrity Policy

Excel Academy Charter School and its programs (“EACS” or the “Charter School”) adopt this Academic Integrity Policy to apply to all students at EACS.

Excel Academy considers academic honesty to be one of its highest values. Students are expected to be the sole authors of their work and to exhibit honest behavior and academic integrity. Students must neither give nor receive any unauthorized aid on any test, paper, or assignment. Use of another person’s work or ideas must be accompanied by specific citations and references. The purpose of this policy is to create and maintain ethics and integrity in all academic endeavors and to provide our students with the tools to write with integrity.

Upon enrollment and at the beginning of each school year, students and parents/guardians will be given a back-to-school packet which includes an overview of Excel Academy’s plagiarism policy including an invitation to access and use the Teacher of Record’s Google Classroom account as a tool to discourage plagiarism. With the help of the Teacher of Record, parents/guardians, and students will discuss the Academic Integrity Code and sign an Academic Honesty Pledge.

Definition of Plagiarism

The unauthorized use or close imitation of the language and thoughts of another author and the representation of them as one's own original work.

- All high school students will sign the [Plagiarism Academic Honesty Pact](#).
- All high school students will submit at least two papers each semester to Google Classroom.

Examples of plagiarism and academic dishonesty include, but are not limited to:

- Quoting someone else's words, sentences, paragraphs, or an entire paper without acknowledging the source within the paper or written assignment
- Utilizing forms of AI to generate student assignments and projects
- Simply listing your sources in the Works Cited page but not citing them in your writing
- Paraphrasing someone else's ideas, opinions, or thoughts without acknowledging the source
- Only citing a portion of the source; even if only one source is used all references need to be cited
- Copying another student's work, paper, and/or essays and turning it in as your own
- Copying another student's computer file or work and submitting the work as your own
- Buying any completed or partial work written by someone else and using it as your own work
- Copying answers from a teacher's manual rather than using the manual to check answers
- Turning in work that you have done for other classes or writing assignments—this is considered academic dishonesty. You need to turn in original writing for each class and assignment
- Any other form of cheating

The above examples represent examples of plagiarism and/or academic dishonesty. Whether a student copies something word-for-word or rephrases the ideas of another student and/or writer without properly acknowledging the source, both constitute examples of plagiarism. Excel Academy recognizes the accessibility of information and online sources. It is therefore imperative for students to review the Academic Integrity policy with their Teacher of Record and ensure steps to avoid plagiarism.

Process for Addressing Incidents of [Academic Dishonesty](#)

First incident:

If a student is suspected of plagiarism or academic dishonesty in any course:

- The ToR will confirm the student plagiarized or has been academically dishonest.
- If confirmed, student will receive an initial F/zero on the assignment in question. The student will be required to redo the assignment by the following Learning Period meeting for a new grade which will be at the teacher's discretion.
- The ToR will consult with school administration.
- A plan will be created to help the student learn about plagiarism and/or academic dishonesty and how to avoid it in the future.
- Student must view webinar on academic integrity shared by the ToR.
- Student will be issued a BIP if the incident is deemed intentional.

Second incident:

If a student is suspected of plagiarism or academic dishonesty in any course for a second time:

- The ToR will confirm the student plagiarized or has been academically dishonest.
- If confirmed, the student will receive an F/zero on the assignment. The student will correct the mistake without a grade increase. The zero for the assignment will remain.
- A meeting with the ToR, parent, and school administration will be scheduled to explain the severity of the issue, to provide additional support, and to warn the student that they will be required to retake the course with a passing grade to receive credit for the course if this occurs again.
- Student will be issued a BIP if this is a second occurrence of either plagiarism or academic dishonesty.

Third incident:

If a student is suspected of plagiarism or academic dishonesty in any course for a third time:

- The ToR will confirm the student plagiarized or has been academically dishonest.
- A meeting with the ToR, parent, and school administration will be scheduled.
- The student may be subject to discipline in accordance with applicable due process provisions in accordance with the relevant charter petition, which is available upon request.
- A meeting with the ToR, parent, and school administration will be scheduled to explain the severity of the issue, to provide additional support, and to warn student that they are in jeopardy of being involuntarily withdrawn from the school.
- The student will be issued a BIP if this is a third occurrence of either plagiarism or academic dishonesty and
 - Students in grades TK-6: These offenses will be dealt with on a case-by-case manner.
 - Students in 7th and 8th grade: MTSS supports will be required and individualized based on the student's curriculum and needs.
 - Student in high school: These students will be removed from the course 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.

Process for Addressing Incidents of Inappropriate AI Usage**First incident:**

If a student is suspected of utilizing AI inappropriately in any course:

The student will receive a warning.

The family will be notified of the warning.

The student and family will receive educational tools for appropriate AI usage.

Second incident:

If a student is suspected of utilizing AI inappropriately in any course for a second time:

- The ToR will utilize the AI approved check to verify AI usage.
- If verified, student will receive an initial F/zero on the assignment in question. The student will be required to redo the assignment by the following Learning Period meeting for a new grade which will be at the teacher's discretion.
- The ToR will consult with school administration.
- A plan will be created to help the student learn about AI usage and how to utilize it appropriately in the future.
- Student must review materials on academic integrity as assigned by the ToR.
- Student will be issued a BIP if the incident is deemed intentional.

Third incident:

If a student is suspected of utilizing AI inappropriately in any course for a third time:

- The ToR will utilize the AI approved check to verify AI usage.
- If confirmed, the student will receive an F/zero on the assignment. The student will correct the mistake without a grade increase. The zero for the assignment will remain.
- A meeting with the ToR, parent, and school administration will be scheduled to explain the severity of the issue, to provide additional support, and to warn the student that they will be required to retake the course with a passing grade to receive credit for the course if this occurs again.
- Student will be issued a BIP if this is a second occurrence of either plagiarism or academic dishonesty.

Fourth incident:

If a student is suspected of utilizing AI inappropriately in any course for a fourth time:

- The ToR will utilize the AI approved check to verify AI usage.
- A meeting with the ToR, parent, and school administration will be scheduled.
- The student may be subject to discipline in accordance with applicable due process provisions in accordance with the relevant charter petition, which is available upon request.
- A meeting with the ToR, parent, and school administration will be scheduled to explain the severity of the issue, to provide additional support, and to warn student that they are in jeopardy of being involuntarily withdrawn from the school.
- The student will be issued a BIP if this is a fourth occurrence of inappropriate AI usage
 - Students in grades TK-6: These offenses will be dealt with on a case-by-case manner.
 - Students in 7th and 8th grade: MTSS supports will be required and individualized based on the student's curriculum and needs.

- Student in high school: These students will be removed from the course 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.

Grievance Procedure

The following procedure is established to ensure that students' grievances are addressed fairly by the appropriate persons in a timely manner. The school prohibits discrimination against students/families on the basis of disability, race, creed, color, gender, national origin, or religion.

If a student is accused of plagiarism, cheating, or other forms of academic dishonesty and the parent/student disagrees:

- The student and parent/guardian will address the school administrator in writing with the reason for the grievance, including why they believe the accusation is not accurate/appropriate.
- The school administrator will investigate and respond with a written determination within ten (10) working days.
- If the concern or grievance is not resolved, the student and parent/guardian may, within ten (10) working days, request a review with the Executive Director. The Executive Director shall investigate and respond to the student and parent/guardian within ten (10) school days after the review. The decision of the Executive Director will be accomplished by the vote of a simple majority and the decision is final.

Consequences for incidents of academic dishonesty are cumulative and are not specific to one course.

Special Education Students

If the at-risk student is an identified Special Education student, including a student with an IEP, the teacher will contact the Special Education Department and comply with all provisions of applicable law in addressing any student conduct concerns, including plagiarism. If the student has a 504 plan, the teacher will notify the Assistant Director of Intervention

Excel Academy's Parent Proctoring Policy

Excel Academy considers academic honesty and integrity to be one of its highest values. Assessments are an integral part of the individualized learning plan for all students. It is critical that all assessments are completed ***independently*** in order to identify areas of strength and any potential learning gaps. The purpose of this policy is to create and maintain ethics and integrity in all academic endeavors. Our intent is to provide our students and parents/guardians with guidelines to understand what is and is not acceptable when proctoring at-home assessments.

Cheating (Definitions of Cheating)

- To act dishonestly; practice fraud
- To violate rules deliberately

Testing Dishonesty in Grades TK - 6

- Searching the internet to find answers
- Use of teacher manuals or answer keys
- Anyone other than the student reading test questions or passages
 - If a read-aloud option is provided through the online system, this is permitted
- Hinting at correct answers or elimination of answers
- Discussing the content of the test with the student within the testing window
- Use of a dictionary
- Use of a calculator
- Use of a multiplication chart, hundreds chart, or math cheat sheet of any kind

*If Excel Academy has reason to believe that testing results are not an accurate reflection of the student's abilities, the student may be ***required*** to take additional assessments proctored by the ToR.

Testing Dishonesty in Grades 7- 12 (i.e. closed-book quizzes, end of unit tests, mid-term exams, and final exams)

- Use of a calculator when not allowed
- Use of "open-book" testing when not allowed
- Using the internet to find answers
- Use of a dictionary or thesaurus
- Use of teacher manuals or answer keys - if a student's entire test is identical to the answer key, and zero work is shown, the student may be asked to retake the test.
- Providing hints or clues to the correct answer

- Copying, recording, or taking screenshots of any part of an assessment for future reference
- Sharing or making any part of the assessment public

Accommodations for Students with IEPs or 504 Plans

If the student has an IEP or 504 Plan, the Teacher of Record will contact the SPED Case Manager or 504 Coordinator to receive clear directions on accommodations that should be provided. Similarly, Excel Academy will comply with all provisions of applicable law in addressing any student conduct concerns, including cheating.

Consequences of Non-compliance

As with any other violation of school rules and regulations, consequences of violations may include, but are not limited to, the following:

- Suspension of school funded internet access if provided by school
- Revocation of school funded internet access if provided by school
- Limitations of school funded computer access
- Revocation of school funded computer access
- Disciplinary processes up to expulsion or involuntary withdrawal
- Legal action and prosecution
- Financial liability for loss of internet/computer system

The parent/guardian is responsible to abide by and to ensure the student abides by the provisions and conditions of this policy and that any violations of the above provisions may result in disciplinary action, the revoking of the user account, and appropriate legal action.

The parent/guardian is also responsible to report any misuse of the information system to school administration. All the rules of conduct described in the publication entitled “Internet/Computer Acceptable Use Regulations” apply when on the internet or using the school-owned computer.

Substance Abuse

Excel Academy does not tolerate the illegal use, possession, or sale of drugs, alcohol, tobacco, or related paraphernalia by students while engaged in school-sponsored educational activities or events. School administrators are required to take immediate action to prevent, discourage, and eliminate the illegal use, possession, or sale of drugs, alcohol, tobacco, or related paraphernalia

while engaged in school-sponsored educational activities or events. Students found in violation will receive a BIP and are subject to discipline, up to and including suspension and/or expulsion.

Smoking and the use of all tobacco products, including the use of electronic nicotine delivery systems such as e-cigarettes is prohibited on all Excel Academy property, including any owned or leased buildings and in school vehicles, at all times by all persons, including employees, students, and visitors.

Child Abuse Reporting

Teachers, instructional aides, classified staff, and other school employees are required by law to report all known or suspected cases of child abuse or neglect to the appropriate law enforcement or child welfare agency. (Pen. Code, § 11166.)

Homicide Threat Reporting

The new statutes require any school district employee interacting with students in grades 6 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 schoolsite 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 schoolsite. (Ed. Code, § 49394.)

SB 906 mandates each LEA provide parents “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. We recommend the notice be included in a district’s Parent/Student Handbook. (Ed. Code § 49392.)

Independent Study Policy

Excel Academy Charter Schools, which operates Excel Academy Charter School – Helendale and Excel Academy Charter School – Warner (collectively, “EACS” or “Charter School”) offers independent study to meet the educational needs of all students enrolled in the Charter School. Independent study is an optional educational alternative in which no pupil may be required to participate and is designed to teach the knowledge and skills of the core curriculum. EACS shall provide appropriate existing services and resources to enable students to complete their independent study successfully.

The following written policies have been adopted by the Board of Directors for implementation at the Charter School:

1. For students in all grade levels offered by the Charter School, the maximum length of time that may elapse between the time an assignment is made and the date by which the student must complete the assigned work shall be twenty-five (25) school days.
2. An evaluation shall be completed to determine whether it is in the best interest of the student to remain in the independent study under the following circumstances:
 - a. In the event that a student misses three (3) assignments during any period of twenty (20) school days.
 - b. In the event the students educational progress falls below satisfactory levels as determined by the Charter School Satisfactory Educational Progress Policy and procedure which considers All of the following indicators:
 - i. The pupils' achievement and engagement in the independent study program, as indicated by the pupils' performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in Education Code 52060(d) paragraphs (4) and (5).
 - ii. The completion of assignments, assessments or other indicators that evidence that the pupil is working on assignments.
 - iii. Learning required concepts as determined by the supervising teacher.
 - iv. Progress toward successful completion of the course of study or the individual course, as determined by the supervising teacher.

The evaluation will be documented in the attendance record and learning record documents and

will be maintained as a mandatory interim student record which shall be maintained for a period of three years from the date of evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to the school.

3. The Charter School shall provide content aligned to grade level standards that is substantially equivalent to in-person instruction. For high school grade levels this shall include access to all courses offered by the Charter School for graduation requirements.
 - a. For college-bound students, all 15 required courses as determined by the UC or CSU as creditable under the A-G admissions criteria are accessible.
 - b. For diploma-bound students, all core courses provide access to A-G approved content in addition to meeting graduation requirements.

4. The Charter School has adopted tiered reengagement strategies for the following:
 - a. Pupils not generating attendance for more than 10 percent of required minimum instructional time over four continuous weeks of a local educational agency's approved instructional calendar;
 - b. Pupils found not participatory in synchronous instructional offerings for more than 50 percent of the scheduled times of synchronous instruction in a school month as applicable by grade span;
 - c. Pupils who are in violation of the written agreement pursuant to Education Code 51747(g).

These procedures shall include local programs intended to address chronic absenteeism, as applicable, with at least all of the following:

- a. Verification of current contact information for each enrolled pupil;
- b. Notification to parents or guardians lack of participation within one school day of the recording of a non-attendance day or lack of participation;
- c. A plan for outreach from the school to determine pupil needs including connection with health and social services as necessary;
- d. A clear standard for requiring a pupil-parent-educator conference to review a pupil's written agreement, and reconsider the independent study program's impact on the pupil's achievement and well-being, consistent with the policies adopted pursuant to paragraph (4) of subdivision (g) of Education Code Section 51747.
- e. An Attendance Intervention Meeting (AIM) will be held once a student receives a second Progress Improvement Notification (PIN) to determine if it is in the best interest of the student to remain in independent study. The meeting shall include a review of the pupil's written master agreement, and reconsideration of the independent study program's impact on the pupil's achievement and well-being. If the student and parent/guardian elect to stay enrolled, the team will develop an

agreement to help support the student to make satisfactory educational progress, including additional resources and supports.

- f. If the student continues to make unsatisfactory educational progress, then a third Progress Improvement Notification (PIN) will be given and an internal evaluation will be conducted to determine whether it is in the best interest of the student to remain in independent study. If the evaluation finds that it is not in the student's best interest to remain in independent study, the student may be removed in accordance with the process outlined in Board Policy 6115 on Attendance, Progress Notification (PIN) and Involuntary Withdrawal.

5. The following plan shall be in place in accordance with Education Code Section 51747 (e) to provide opportunities for both synchronous interaction and live interaction:

- a. Pupils in all grades Tk-12 will have access to their teacher or teachers of record (as designated by Education Code Section 51747.5) for synchronous instruction opportunities as outlined in Education Code Section 51747(e) between the pupil and a Charter School employee or employees for the purpose of maintaining school connectedness. This interaction may take place in person, or in the form of internet or telephonic communication.
- b. For pupils in Transitional Kindergarten through grade 3, inclusive, opportunities for daily synchronous instruction will be provided for all pupils throughout the school year by their teacher or teachers of record.
- c. For pupils in grades 4 to 8, inclusive, opportunities for both daily live interaction (by a Charter School employee) and at least weekly synchronous instruction (by their teacher or teachers of record) will be provided for all pupils throughout the school year.
- d. For pupils in grades 9-12, inclusive, opportunities for at least weekly synchronous instruction will be provided for all pupils throughout the school year by their teacher or teachers of record.

6. The following plan shall be utilized to transition pupils whose families wish to return to in-person instruction from independent study expeditiously, and, in no case, later than five instructional days: the Charter School will assist the student and family with enrollment in the school district of residence.

7. A current written agreement shall be maintained on file for each independent study student, including but not limited to, all of the following:

- a. The manner, time, frequency, and place for submitting a student's assignments, for reporting the student's academic progress, and for communicating with a pupil's parent or guardian regarding a pupil's academic progress.
- b. The objectives and methods of study for the student's work, and the methods utilized to evaluate that work.

- c. The specific resources, including materials and personnel, which will be made available to the student. These resources shall include confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.
- d. A statement of the policies adopted herein regarding the maximum length of time allowed between the assignment and the completion of a student's assigned work, the level of satisfactory educational progress, and the number of missed assignments allowed prior to an evaluation of whether or not the student should be allowed to continue in independent study.
- e. The duration of the independent study agreement, including beginning and ending dates for the student's participation in independent study under the agreement. No independent study agreement shall be valid for any period longer than one school year.
- f. A statement of the number of course credits or, for the elementary grades, other measures of academic accomplishment appropriate to the agreement, to be earned by the student upon completion.
- g. A statement detailing the academic and other supports that will be provided to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, individuals with exceptional needs in order to be consistent with the pupil's individualized education program or plan pursuant to Section 504 of the federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794), pupils in foster care or experiencing homelessness, and pupils requiring mental health supports.
- h. The inclusion of a statement in each independent study agreement that independent study is an optional educational alternative in which no student may be required to participate. The student will always be eligible to return to his/her school district. The Charter School will assist with the transition of pupils whose families wish to return to in person instruction from independent study expeditiously, and, in no case, later than five instructional days.
- i. In the case of a student who is referred or assigned to any school, class or program pursuant to Education Code Section 48915 or 48917, the agreement also shall include the statement that instruction may be provided to the student through independent study only if the student is offered the alternative of classroom instruction.
- j. For a pupil participating in an independent study program that is scheduled for more than 14 school days, each written agreement shall be signed, prior to the commencement of independent study, by the student, the student's parent/guardian if the student is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. Beginning in the 2022–23 school year, for a pupil participating in an independent study program that is scheduled for less than 15 school days, each

written agreement shall be signed within 10 school days of the commencement of the first day of the pupil's enrollment in independent study, by the pupil, the pupil's parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. For purposes of this paragraph "caregiver" means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of Division 11 of the Family Code.

- i. Written agreements may be signed using an electronic signature that complies with state and federal standards, as determined by the California Department of Education, that may be a marking that is either computer generated or produced by electronic means and is intended by the signatory to have the same effect as a handwritten signature. The use of an electronic signature shall have the same force and effect as the use of a manual signature if the requirements for digital signatures and their acceptable technology, as provided in Section 16.5 of the Government Code and in Chapter 10 (commencing with Section 22000) of Division 7 of Title 2 of the California Code of Regulations, are satisfied.

The Charter School shall comply with the Education Code Sections 51745 through 51749.3 and the provisions of the Charter School's Act and the State Board of Education regulations adopted thereunder.

The Executive Director may establish regulations to implement these policies in accordance with the law.

Travel Plan

- A Travel Plan is needed for any travel longer than 2 weeks (10 school days).
- Request and receive approval for extended travel from your Teacher of Record 2 weeks (10 school days) prior to the travel period.
 - During travel time, a student must be attending school and the parent/guardian must be available by phone and/or internet for communication during Excel Academy's operating hours.
- Students cannot be on extended travel longer than four consecutive weeks per semester (30 consecutive days).

Required Courses for TK-8

- Language Arts
- Mathematics

- Social Studies
- Science
- PE

Optional Opportunities for 7-8 Courses

- Advanced JH Language Arts
- Advanced JH or HS Math
- Elective JH options
- HS World Language
- Optional courses may be added to the student's Master Agreement with pre-approval from the Secondary Department. All optional course requests begin with the ToR.

Curriculum and Education Resources

Excel Academy offers quality curricular options and an extensive list of Content and Community Providers to assist students in attaining excellence in their educational goals. The ToR and family work together to complete a Course of Study for the student, identify curricular options that will meet the student's needs, and make sure school guidelines and state standards are met. For more information, please visit our [Content & Community Provider Resources page](#).

Other enrichment courses and activities can be found using our [Content & Community Provider search tool](#). Parents are encouraged to pursue educational choices that best reflect the academic and social needs of their individual student. Students benefit from learning at home and can take supplemental courses offered through approved Content and Community Providers. Please consult with your ToR to determine a course of study that balances the student's academic and extracurricular interests.

Vetted and approved materials are listed in the Curriculum Handbooks for both Elementary and Secondary. Additionally, the Education Departments provides abbreviated Curriculum Menus for all grade levels to help parents make informed choices about quality curriculum. ToRs will provide these resources to all families.

California State & Grade-Level Standards

Excel Academy students must show progression towards and mastery of California State Content Standards in order to remain in the school. With the help of an assigned ToR, students will be guided towards the completion of these standards. ToRs will regularly monitor and adjust student progress through the curriculum to ensure completion of the grade-level standards.

ToRs will provide a copy of the grade-level content standards for all students enrolled. Additionally, parents can obtain the subject and course standards directly from the [California Department of Education](#) website.

Observation of Student Educational Activities

EACS staff may observe any enrolled student while engaged in educational activities, with or without prior notice. While this is permitted to occur for any reason deemed appropriate and necessary by EACS administration, the primary functions of observation are to ensure that EACS is providing adequate support to students learning in our non-classroom based model, as well as to provide support and evaluative feedback to staff. Observations may occur during any Excel Academy sponsored, funded, or supervised activity including but not limited to virtual meetings, online courses, in-person meetings, enrichment activities, extracurricular activities, and field trips.

PE Requirements

The physical education requirements are:

- 200 minutes per week for 9th-12th grades
- 200 minutes per week for 7th-8th grades
- 100 minutes per week for 1st-6th grades

Students in grades TK-8 may log their physical activities for each LP on a PE log. High school students must complete a PE log each month along with a brief, written paragraph.

*Please talk with your assigned ToR for further clarification.

Junior High PE grading

200-160 minutes - A

159-120 minutes - B

119-80 minutes - C

99-40 minutes - D

39-0 minutes - F

High School PE grading

200-160 minutes - A

159-120 minutes - B

119-80 minutes - C

99-40 minutes - D

39-0 minutes - F

A log without the written paragraph will be reduced by one letter grade.

CHYA-California Healthy Youth Act

The California Healthy Youth Act, commonly known as CHYA, is a mandate that requires public schools in the state of California to offer medically accurate, comprehensive sexual health education, and HIV prevention to students once in junior high and once again in high school. For more information on CHYA, please go to: <https://www.cde.ca.gov/ls/he/se/index.asp>. [Materials are available for review upon request.](#)

If any parent wishes to opt their student out of the CHYA requirement, they must do so with a signed, dated note to their assigned ToR upon enrollment or upon receipt of the annual parent notification letter.

Student Athletes

Student athletes who are interested in using Instructional Funds (IFs) toward their sport must maintain their attendance, grades, and comply with the policy set forth.

- Junior high students must be registered for at least 4 academic courses
- High school students must be registered for at least 5-6 academic courses depending on graduation credits needed and subject requirements fulfilled. For students interested in pursuing an NCAA pathway, please see below for requirements.

All students must:

- Maintain a minimum GPA of a 2.0
- Attend all LP meetings as scheduled
- Be up-to-date on assigned work

If a student athlete finds themselves in academic distress, they will be required to attend an SST meeting. Also, depending on the severity of the situation **IFs may be revoked from being used towards their sport.**

High School

Excel Academy offers a personalized approach to learning where parents are encouraged and supported in choosing curricula from the high school catalog that matches their students' needs, expectations, and rigor in each subject area. With guidance and support from the ToR and the High School Department, parents will be sure to meet California State Standards and provide their student with a relevant course of study for their grade level. Click on [HS Course Curriculum Catalog](#) to view curriculum choices.

High School Students Admitted 10 days After the School Year Started

All high school students who enroll 10 days after the semester begins will be required to submit in-progress grades from their previous school.

Minimum & Maximum Course Policy

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 4-5 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.

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 - 8/22/2024- 9/5/2024

Spring -1/13/2025- 1/24/2025

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 10/11/24 for fall semester or 3/7/25 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.

Individual CCPs have their own refund policies. Please work with your ToR if you have any questions on this.

Transcripts

Official transcripts should be requested from the Registrar’s office via the [Transcript Request Link](#) at least two weeks prior to deadlines.

Transcript Revision Requests

Excel Academy will revise a transcript due to either a clerical error and/or an approved official grade change request. No other transcript revisions will be made, as a transcript is an official document reflecting an individual student’s credits earned and courses completed. Parents requesting a transcript review will need to complete the [Student Transcript Revision Request form](#).

Repeated Courses

Only courses in which grades of a D/F are earned may be repeated. The highest grade will be used in the GPA calculation. *The UC only allows a course to be repeated one time for grade replacement.*

Graduation Requirements

Students are eligible for a diploma when all requirements have been met:

English - 40 credits

Math - 20 credits

Science - 20 credits (1 life/1 physical)

History - 30 credits (1 US/1 world/gov/econ)

VAPA/World Language/CTE - 10 credits

PE - 20 credits

Ethnic Studies - 5 credits

Electives - 75 credits

Total to graduate: 220 credits

1 semester class = 5 credits / 2 semesters/1 year = 10 credits

Graduation Track Options

College Prep Track (UC, CSU, Private) CSU Admissions UC Admissions	Customized Graduation Track (Career, Community College, Military, Trade School)
Freshman Year	Freshman Year
English 9 10 credits	English 9 10 credits
Algebra 1 or Geometry 10 credits	Pre-Algebra or Algebra 1 10 credits

Biology	10 credits	Life Science	10 credits
World Language year 1	10 credits	Elective	10 credits
Physical Education	10 credits	Physical Education	10 credits
Minimum 50 Credits		Minimum 50 Credits	
Sophomore Year		Sophomore Year	
English 10	10 credits	English 10	10 credits
Geometry or Algebra II	10 credits	Algebra I or Geometry	10 credits
World History	10 credits	Physical Science	10 credits
World Language year 2	10 credits	Physical Education	10 credits
Chemistry	10 credits	World History	10 credits
Physical Education	10 credits	Elective	10 credits
Minimum 60 Credits		Minimum 60 Credits	
Junior Year		Junior Year	
English 11	10 credits	English 11	10 credits
Algebra II or Pre-Calculus/Trig	10 credits	World Language/VAPA/CTE	10 credits
World Language year 3	10 credits	U.S. History	10 credits
VAPA	10 credits	Elective	10 credits
US History	10 credits	Elective	10 credits
Physics or Env. Science	10 credits	Elective	10 credits
Minimum 60 Credits		Minimum 60 Credits	
Senior Year		Senior Year	
English 12	10 credits	English 12	10 credits
Ethnic Studies	5 credits	Government	5 credits
Pre-Calculus or Calculus	10 credits	Economics	5 credits
Government	5 credits	Ethnic Studies	5 credits
Economics	5 credits	Elective	10 credits
Elective	10 credits	Elective	10 credits
Elective	5 credits	Elective	5 credits
Minimum 50 Credits		Minimum 50 Credits	

Total to graduate is 220 credits - All high school core courses will utilize college-prep curriculum for both the College Prep and Customized Track. The customized graduation track prepares students for meeting the minimum graduation requirements while still receiving access to A-G curriculum options. Families have the ability to work alongside their ToR to build a personalized learning experience and choose from a range of curricular options for their students.

Honors and Awards

Students may receive one of the following GPA-based Awards:

Valedictorian: Student with the highest weighted GPA in their class (after 7 semesters) is eligible to receive the honor of becoming Valedictorian of their graduating class.

Salutatorian: Student(s) with the second highest weighted GPA in their class (after 7 semesters) is eligible to receive the honor of becoming Salutatorian of their graduating class.

Excel Academy recognizes graduates in the following ways:

National Junior Honor Society:

The National Junior Honor Society requires high academic scholarship. Service to the community, well-rounded leadership, and high character. Students inducted into the NJHS will be recognized during the promotion ceremony.

National Honor Society:

The National Honor Society requires high academic scholarship, service to the community, demonstrated leadership, and high character. Students inducted into the NHS will be recognized during the graduation ceremony.

Golden State Merit:

Per the CDE: The Golden State Seal Merit Diploma (GSSMD) insignia is awarded jointly by the State Board of Education and the State Superintendent of Public Instruction to recognize students who have demonstrated mastery of the high school curriculum in at least six subject areas. Students who meet these minimum state requirements will be recognized during the graduation ceremony.

Presidential Awards:

The Presidential Awards honor both high educational excellence through the gold award, and high educational achievement through the silver award. Five graduates will be recognized in both the gold and silver categories.

State Seal of Biliteracy:

Per the CDE: The State Seal of Biliteracy (SSB), marked by a gold seal on the diploma or transcript, recognizes high school graduates who have attained a high level of proficiency in speaking, reading, and writing one or more languages in addition to English. Students who meet this requirement will be recognized during the graduation ceremony.

College Prep/A-G Explained

For admission to the University of California (UC) or California State University (CSU) systems, a college-preparatory program that prepares students for higher-education is followed. The college-prep track prepares students for college and follows the A-G requirements as put forth by the UC/CSU systems. Students must complete a total of 15 year-long, A-G high-school courses with a grade of C or better—at least 11 of them prior to their senior year. See link: [UC A-G Subject Requirements](#).

Graduating Early: If a student wishes to graduate early, the student's 4-year plan must be reviewed and approved by a School Counselor so that students fully understand the implications of this decision. Students graduating early may require additional credit completion per semester. Any course load above the maximum 8 courses, would require students to complete the remaining courses during summer school. Excel Academy currently does not offer summer school. Students will need to submit summer school transcripts for review and credit completion purposes.

Advanced Course Designation

Below are the eligibility requirements for all advanced course options:

- Student must have a minimum 3.0 GPA
- Student must show advanced course readiness in their respective core courses and assessments (such as CAASPP, iReady, Excel Academy assessments, GPA, and report-card grade in respective subject)
- ToR recommendation with guided rubric (community provider & online provider recommendations may also be submitted for consideration).

Honors Courses

Honors courses are designed to be more in-depth, challenging, and rigorous. High school students may take honors courses with prior written approval. Junior high students may take a high school, honors-level math and/or world language course with prior written approval. Junior high students do not receive a GPA bump for honors courses. The student may submit the course for approval, by following these steps:

- Student requests to register for an honors course
- ToR completes Survey for Advanced Courses
- The Secondary Department will review each request to verify eligibility.
- If approved, all honors courses require a quarterly project - Imagine Edgenuity and Florida Virtual are the only providers wherein students will not need to complete additional coursework.

- ToR will assist students in meeting additional honors requirements
- Honors credit will not be issued retroactively post the 10-day add/drop window
- Up to 8 year-long high school courses will be eligible for a full-grade percentage bump per course that earns a passing score. GPA bumps will not be issued for honors courses beyond 8 classes, but students may enroll in additional honors courses for the academic challenge.
- Transcripts from the online provider may be required to receive credit.

Advanced Placement (AP) Courses

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

- Student requests to register for an Advanced Placement course
- ToR completes Survey for Advanced Courses
- High School Department will review each request to verify eligibility
- **Excel Academy is not an AP exam testing site.** Excel Academy high school students who wish to take an AP exam must go through their local public high school or visit collegeboard.org for more information on in-person AP test options. Students and parents are responsible for making this arrangement in early fall and meeting the registration deadlines and fee payments for the testing site. Instructional funds cannot be used to pay for AP exams.
- Up to 8 year-long courses will be eligible for a full-grade percentage bump per course that earns a passing score. GPA bumps will not be issued for honors courses beyond 8 classes, but students may enroll in additional AP courses for the academic challenge.
- Transcripts from the online provider may be required to receive credit.

Although many providers advertise AP courses, similar to A-G, Excel Academy must approve and offer any AP course to designate this distinction on the transcript. Courses listed on our [College Board AP Ledger](#) are preapproved. Please refer to the [High School Catalog](#) for current curricular requirements and offerings. Courses taken through providers may require the submission of transcripts to receive credit.

Additional Advanced Course Options

For students wishing to complete a year-long course in one semester (i.e. English 9 A/B), they must choose a curriculum from the High School Course Curriculum Catalog with the exception of in-person provider courses or enroll in a concurrent enrollment course.

- Student requests to register for an accelerated course with their ToR
- ToR completes Survey for Advanced Courses

- HS Department will review each request to verify eligibility
- ToR will aid the student in choosing curriculum that would work for this designation or follow process for concurrent enrollment (see College Readiness section below)
- ToR will pace out the first semester into the first quarter to ensure student understands the workload requirement. If a student is not close to the 50% completion mark by the quarter, the approval to complete the year-long course in one semester will be revoked, and the student will need to finish the second half of the class in a subsequent session such as summer or the following semester. Excel Academy does not provide summer sessions but will accept transcripts for courses completed at accredited institutions.

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 Catalog with the exception of in-person provider courses.

Junior High Students Taking High School Courses

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 CAASPP/SBAC 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 junior high LOTE course with an 85% or higher.

- Student demonstrates fluency in reading or writing in a LOTE.
- Student receives a recommendation which utilizes a combination of a cognitive and soft skill evaluation from their Teacher of Record or former teacher.

All junior high students may enroll in a junior high level language course using instructional funds without the need for approval from the high school department.

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 s are still required to complete courses for the CA graduation requirement the high school math while in grades 9th-12th. Thus, high school-level courses taken in junior high will give students additional graduation credit (5 per semester) but will not help clear a graduation requirement in math. Every high school student is required to complete at least two years of high school math. Grades earned will not count towards the high school GPA. World Language courses taken in 7th and/or 8th grade will help clear the LOTE/VAPA/CTE graduation requirement. These grades earned will not count towards the high school GPA.*

College Readiness

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). Students must be enrolled with Excel Academy at least one full semester prior to receiving approval to enroll in a concurrent enrollment course. For any incoming student who demonstrates prior success in a college course, approval to enroll in a concurrent enrollment course will be reviewed.
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 4-5 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). It is the family's responsibility to pay for college textbooks and other required course materials if enrolled in a college course. Instructional Funds may not be used to pay for college classes, textbooks, or other course materials unless the bookstore is an approved Excel Academy provider.

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 depending upon the credits needed to remain scheduled to graduate in four years. 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, only 5% of Excel Academy students can attend a community college during the summer. Priority approval will be given to those needing courses to graduate.
15. 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. Official transcripts need to be requested at least once a year to ensure student transcripts remain up to date. 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
 1 Technology Drive, Ste. I-811
 Irvine, CA 92618

College Unit Conversion Policy

Excel Academy uses the following formula for converting college units to high school credits:

- 3-5 unit degree applicable (UC/CSU transferable) college courses = 10 high school credits
- Most PE courses have been excluded or restricted for concurrently enrolled students, but a 1 unit course such as Dance, if approved by the college would = 5 high school PE credits
- Some college policies state that their world language course content is equivalent to two years of high school world language; however, a maximum of 10 high school credits will be given per community college course

- College-level courses will receive a corresponding GPA bump up to eight respective courses on their transcript
- College courses taken in excess of the minimum Excel Academy graduation credit requirements of 220 credits may not be issued dual enrollment credit. They will receive college credit but may not receive the additional high school credit.
- For a list of community colleges, see our [Community College Handbook](#).

Career Readiness

CTE - Career and Technical Education

Excel Academy offers Career Technical Education (CTE) which provides college preparation and career training for high school students. Career and Technical Education (CTE) is a series of high-school elective courses that provide students with opportunities to explore career pathways and experience hands-on training and education in career fields/sectors that interest them. Students learn workplace competencies that help make academic content more accessible. Each pathway is a two-year program that consists of a concentrator and a capstone course. Students who complete both courses will receive a Completer recognition. CTE provides the academic and technical skills, knowledge, and training necessary to succeed in future careers.

CTE offerings:

- *Patient Care Pathway* (Health Science and Medical Technology Sector):
- *Marketing Pathway* (Marketing, Sales and Services Sector)
- *Digital Media and Photography Pathway* (Arts, Media and Entertainment Sector)

College Entrance Exam Information

PSAT/NMSQT

The Preliminary SAT®/National Merit Scholarship Qualifying Test is a co-sponsored program by the College Board and National Merit Scholarship Corporation (NMSC). PSAT/NMSQT stands for Preliminary SAT/National Merit Scholarship Qualifying Test. The PSAT is a standardized test that provides first-hand practice for the SAT Reasoning Test™. The NMSQT gives students a chance to enter the National Merit Scholarship Corporation (NMSC) scholarship programs. The PSAT/NMSQT measures critical reading skills, math problem-solving skills, and writing skills. Administrators and teachers are cognizant of testing schedules, so they can assist students by providing appropriate information. Students register for and attend these tests independent of Excel Academy. Please visit collegeboard.org for more information.

SAT/ACT

The SAT Reasoning Test (formerly Scholastic Aptitude Test and Scholastic Assessment Test) and the American College Testing Program (ACT) are standardized tests for college admissions. Most colleges accept either the SAT or ACT exam as part of their admissions process, however many California universities are test optional at this time.. Students register for and attend these tests independent of Excel Academy. Test dates, registration dates, fees, subject areas tested, practice questions, and scores can be accessed by visiting collegeboard.org for the SAT and actstudent.org for the ACT.

NCAA - National Collegiate Athletic Association

[23/24 NCAA Curriculum Handbook](#)

In order to graduate as a designated NCAA student athlete, students must confirm with their School Counselor that they are enrolled in all currently approved coursework beginning in 9th grade. For students who transfer post 9th grade or request to participate post 9th grade, no assurances can be made to guarantee that a student will be eligible to apply as an NCAA student athlete. Below is the list of requirements for Division 1 athletes:

Division 1 Course requirements:

Complete 16 core courses with NCAA approved curriculum

English - 4 years

Math - 3 years

Science - 2 years

Choose English, math, or science - 1 year

History - 2 years

Choose English, math, science, history, world language, comparative religion or philosophy - 4 year-long classes

Students must complete 10 of the core courses by the end of their junior year (before the start of their seventh semester). Seven of the ten core courses need to be in English, math or natural/physical science. The grades in these seven courses will be “locked in,” meaning you will not be allowed to retake them to improve your grades. Below is a sample schedule:

9th	10th	11th	12th
English 9	English 10	English 11	English 12
Algebra 1	Algebra 2	Geometry	PreCalculus
Biology w/ lab	Chemistry w/ lab	Physics w/ lab	Gov + Econ
Spanish 1	World History	US History	Elective
PE 9	Spanish 2	Elective	Elective
	PE 10	Elective	

Students should always verify with the NCAA portal that their curriculum/courses are NCAA approved. Per the NCAA instructions, “For any outside traditional/nontraditional coursework completed in addition to the home school program, the college-bound student-athlete should: » Include the high school/program in their education profile. » Check the status of the high school/ program to ensure it is “Cleared,” and has an approved core-course list. (Be sure to review the Additional Information section.) » Ask for an official transcript or grade report to be submitted directly to the NCAA Eligibility Center.”

Grading

The grade issued to each student is determined by the course learning environment and overseeing teacher/s. All online and Excel Teacher-Led (ETL) courses will be graded by the course teacher. Any parent-led class will involve collaboration among the parent, ToR, and HQT. See below for further details:

- Online course - the grade will be issued by the online instructor.
- Excel Teacher Led course - the grade will be issued by the Excel teacher.
- Customized course - the grade will be issued by the ToR with collaboration among parent, ToR, and HQT.
- Community College course - the grade will be issued by the college instructor.
- Students taking online classes or classes with an approved CCP need to consult with the online teacher or instructor regarding questions about grades, averages, or course progress. Excel Academy uses a traditional 4.0 scale in determining Grade Point Average (GPA). Credit is only granted for courses that earn a minimum of 60% out of a possible 100%.

- Excel Academy High School Department reserves the right to review final grades with the exception of any non-Excel Academy issued transcript.
- Excel Academy uses a letter-grading system which does not include any Pass/No Pass grades.

In the event that a parent/guardian disagrees with the student's final grade(s), the steps below must be followed

1. Parent/guardian will
 - a. Communicate the concern to the ToR in writing and provide the ToR the opportunity to explain the rationale for the final grade
2. Parent/guardian is not satisfied with ToR rationale and will
 - a. Submit a formal challenge to the Director of Assessment and Accountability by submitting the Parent/Guardian - Final Grade Challenge
 - b. Director of Assessment and Accountability will
 - i. Review the challenge by ensuring the ToR used due diligence in evaluating the student's academic performance
 - ii. Communicate findings in writing to the parent/guardian within two weeks of receiving the formal challenge

High School Prerequisites

Mastery of a certain body of knowledge is necessary if students are to be successful in their courses. Most commonly, such knowledge is measured by successful completion of the prerequisite courses listed in the course description. For graduation purposes, "successful completion" is defined by a grade of "A," "B," "C," or "D" in the prerequisite course. For college preparation and A-G course completion, "successful completion" is defined by a grade of "A," "B," or "C" in the prerequisite course. For advanced course prerequisites, please refer to each advance course policy and the High School Catalog. Grades that are not acceptable are "F," "I," or "NG." Although Excel Academy will review incoming grades to reflect a "P" or "NP," the school does not grant a "P" or "NP" for students enrolled in Excel Academy for the duration that requires a grade to be given.

How to Clear a Prerequisite

Students enrolling in a course with a prerequisite will be required to do one of the following:

- Complete the required prerequisite course(s) at Excel Academy with a satisfactory grade that is a grade of "A," "B," "C," or "D" respectively. Some prerequisite courses must maintain a grade of a B or higher to qualify for the subsequent course.
- Students must present transcripts from another high school, if applicable, to the School Counselor for a transcript review as soon as possible.

- Transcripts must demonstrate satisfactory completion of the prerequisite course; completion of the course with a grade of “A,” “B,” “C,” “D,” or “P” respectively.
- It is at the school’s discretion to accept or deny the request to waive the prerequisite course requirement.

Transfer Credits

Transferable Grades and Credits

Transfer grades and credits received from previous schools/programs will be accepted and applied as needed to meet Excel Academy’s graduation requirements. Transfer students who have met EACS graduation requirements prior to the start of the new school year will be referred back to their current school.

Official transcripts are required in order to award credit. Transcript analysis may require research and contact with previous institutions to determine eligibility of transfer credits. International records may require translation and/or evaluation prior to being considered for transfer credits. Costs for translation and external evaluations are sustained by the student.

Students leaving EACS before the end of the semester will earn a progress report indicating a percentage grade or percentage earned from the time of enrollment to exit but will not earn credit, OR a report card with earned percentage denoted by IP for in progress for any unfinished course.

If a student is given a percentage or provided with a percentage grade upon exiting their previous school, Excel Academy may award the transfer grade by applying a percentage to the amount of work equivalent to what was completed at the previous school or require the student to complete the remaining course requirements. Students who are provided with exit grades without percentages will be awarded a transfer grade equivalent to the amount of work completed at the previous school in accordance with the following scale:

Any A: 90%

Any B: 80%

Any C: 70%

Any D: 60%

Any F: 59%

Physical Education for the High School Student

State law requires 2 years of PE to be completed before a student can graduate.

High school students are required:

1. To complete 400 minutes of PE every 10 school days (approximately 40 minutes per day).
2. To complete a PE log each month (which is available in the Parent Portal), along with a brief, written paragraph.

If a student is unable to participate in physical activities, the student can complete an alternative assignment approved by their ToR. If the inability to participate extends beyond 5 school days, a doctor's note will be required. Likewise, for students with serious medical issues, a doctor's note must be provided for proof of inability to do traditional PE. Acceptable options would include a written paper on physical activities/exercises and the benefits to the body or a research paper completed on various forms of exercise such as dance, yoga, or a sport of the student's choice. This may be turned in as the sample at the LP meeting as a replacement to the PE Log.

Please refer to the [PE Requirements](#) section for information about physical education grading.

High School Acceptable Sample Requirements:

There are a variety of ways to show academic progress and proper pacing. The ToR will review the body of work and collect a sampling of this work. Final determination on acceptance may be determined by the Highly Qualified Teacher (HQT) and/or the Teacher of Record.

Here are some suggestions:

- A unit test - strongly prefer that it comes from the publisher or course. All assessments must demonstrate high school-level rigor.
- 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.
- 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 the [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 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 HS level work/detail
- Another high school-level sample as agreed upon by ToR/parent/student in advance

Driver's Education

High School students can take a Driver's Education course by choosing one of the approved high school course curricula options found in the High School Catalog for a total of 5 elective credits. This course prepares students for the writing portion of the driver's permit test; although, completion of the course does not result in a driver's permit. Please note, IFs may not be used for behind-the-wheel instruction, as this is the responsibility of the parent/guardian. Driver's License information can be found at the following link: [CA DMV](#).

Diploma

Students will have the opportunity to display a legal name or a preferred name on a diploma using the intent to graduate form. The school considers the diploma to be a ceremonial document, and thus you may enter a familiar or preferred name to be used in lieu of your name of record for this purpose. However, please be advised that in some situations your diploma may need to be used as a legal document, and the name appearing on your diploma may need to match other legal documents you possess. For further information on this, contact the school Registrar.

State Seal of Biliteracy:

In order to be eligible for the State Seal of Biliteracy, students must meet the following criteria:

Proficiency in English shall be demonstrated by one of the following requirements:

1. Complete all English language arts requirements for graduation with an overall grade point average of 3.0 or above in those classes.
2. Pass the California standards assessment at the "standards met" or above in English language arts (ELA) set for native English speakers at the 11th grade.

Demonstrate proficiency in one or more languages—in addition to English—by accomplishing **one** of the following:

1. Score three or higher on an Advanced Placement (AP) world language examination.
2. Score four or higher on an International Baccalaureate world language examination.

3. Score at the “proficient” level or higher on a school district language examination that, at a minimum, assesses speaking, reading, and writing in a language other than English.
4. Successfully complete a four-year high school course of study in a world language and attain an overall grade point average of 3.0 or above in that course of study, **including oral proficiency.**
 - i. Successful completion of high school level courses completed in another country in a language other than English with the equivalent of an overall grade point average of 3.0 or above, as verified through a transcript
 - ii. Completion of one or more world language courses at a public higher education institution or an independent institution of higher education with a grade point average of 3.0 or above and oral proficiency in the language
5. Per the CDE: In addition to the requirements mentioned above, if the primary language of a pupil is other than English, they shall demonstrate English proficiency on the English Language Proficiency Assessments for California (ELPAC), or any previous or successor state English language proficiency assessment, in transitional kindergarten, kindergarten, or any of grades 1 to 12, inclusive (California Education Code Section 51461). If students have a primary language other than English, they must meet the criteria in items 1–3 above and also obtain a score of 4 on the English Language Proficiency Assessments for California Development Test ([ELPAC](#)).

Excel Academy offers a language exam option for students who have no language course or assessment offered at their school through Language Bird. Instructional funds may be utilized to pay for this language assessment. It is each student’s responsibility to review yearly assessment dates. Assessments are typically administered once in the fall and once in the spring. Language Bird provides a variety of language assessment options and families will need to review the list as these are subject to change from year to year.

Instructional Funds and Content and Community Provider (CCP) Policies

Excel Academy has a list of community providers who deliver an array of products and services to enrolled families. Currently enrolled parents and ToRs are able to request new community providers. Excel does not accept solicitations.

Content and Community Provider (CCP) must complete the CCP application process. For service CCPs who work directly with Excel students, they must complete Live Scan fingerprint background checks and submit proof of commercial liability insurance. Please understand this is an important step to protect your students. If a CCP does not wish to complete all parts of the application, including the Live Scan fingerprint background check and insurance requirements, the application cannot be approved. Families that join Excel Academy have access to the approved CCP list.

Instructional funds (IFs) are dispersed at the discretion of the ToR and the Student Services Department among approved CCPs.

Educational material CCPs provide educational curriculum, books, materials, and supplies for Excel Academy students. Items ordered should be basic in quality and appropriate to the student's age, grade, and need. IFs depreciate daily depending on the day of actual enrollment and must be used in the same academic year.

Educational services are provided by a CCP Course Instructor. This person(s) or facility provides academic tutoring, supplemental academic classes, art/music lessons, physical education classes, or other supervised/guided instruction. A service order request does not guarantee placement in a CCP's class. The parent must communicate directly with the CCP to ensure the CCP has open spots in a class.

All purchase orders must be created prior to using services or ordering materials. Excel Academy will not reimburse parents directly. If on a *rare* occasion, a CCP agreement has expired or dissolved, Excel Academy cannot pay for services or materials purchased from them. The ToR will notify families who happen to order something from a CCP such as this.

Additional Documents for Parent Use

- [Ordering Guidelines 24/25](#)
- [Student Services Department FAQ](#)
- [Parent Purchase Order Training 24/25](#)

Find a CCP Near Your Home

Excel Academy has an interactive map tool that allows you to search for CCPs in a specific area. You are able to search by CCP name, subject, or area of service. To view the CCP map, click [here](#).

To use this map follow the simple steps below:

- Enter your search criteria into the appropriate box.

- The list will be populated based on your entry.

Family CCP Agreement

A signed copy of the [Family Content and Community Provider \(CCP\) Agreement](#) must be on file before the family can begin placing purchase orders for services. The ToR will go over the Family CCP Agreement carefully with each parent before signing. The ToR may be asked to produce a copy of the signed Family Content and Community Provider (CCP) Agreement at any time.

Instructional Funds (IFs)

Depending on grade level and date of enrollment, between \$3,400-\$3,900 will be allotted to each student, with which families can select approved educational materials and services.

Funds may only be used during the school year in which they were allotted and do not carry over from year to year. Use of IFs is up to the discretion of the ToR . Funds are prorated after the first day of the school year.

The IFs are as follows:

Personalized Path

TK-8th \$3,400

High School \$3,900

The IFs are disbursed in multiple allotments:

TK - 8th \$1,700 in August, \$1,700 in December

High School \$1,950 in August and \$1,950 in December

Virtual Path

1st - 8th \$2,100

The IF's will be disbursed in multiple allotments:

1st - 8th \$1,050 in August, \$1,050 in November

Criteria for Materials That Can Be Purchased with IFs

Excel Academy receives funding from the state to support student learning and progress toward the standards. Therefore, IFs need to be spent on educational items that meet the criteria below. ToRs will consult with the Student Services Manager 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.

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.
- 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.
- 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.

Disallowed Items:

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

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. Community providers who provide the below services will not be approved.

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

Additional Guidelines for Specific Items

Excel Academy 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 [Disallowed List](#) for a detailed list of disallowed items.

Sectarian Materials

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

Computer Ordering Policy

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.

Technology Policies

- Environmental waste fees and warranties for school owned computers **must** be purchased with IFs.
- All families must have the [EACS Technology Agreement](#) on file and uploaded to SIS under notes 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.
- All Excel Academy issued Chromebooks come installed with GoGuardian, a monitoring and filtering system that allows Excel Academy to block inappropriate or time wasting internet usage, and tracks all student searches and visited websites. Due to this, Excel Academy is notified when a student makes an inappropriate or harmful search, and will contact the parent/guardian to alert them of their student's inappropriate usage of their Chromebook, as determined by the school Principals.
- Please note that computers don't come with any additional software (e.g. Microsoft Word).
- A list of available technology options may be obtained through your Teacher of Record. All computer orders must be placed according to the options listed on the computer options document.
- One computer or tablet per student TK- 12th grade until the computer is unable to provide adequate support to participate in the educational program and complete assigned work.

Return Policy for Materials Content & Community Providers (CCPs)

An Education Materials CCP is a business that provides curriculum, books, and school supplies. When placing material (EMR) orders, please research and choose wisely with careful consideration. Many CCPs do not accept returns from a school, and funds cannot be returned to individual student accounts. If a return is allowed, shipping costs will be deducted from the student account.

Cancellation Policy

We cannot cancel an EMR order after they are processed and sent to the CCP. 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 "Pending Status," the ToR can cancel or edit the purchase order in OPS. For VCI orders, CCPs must be notified of cancellation prior to orders being canceled in OPS.

To cancel a purchase order in the prepending stage, you must pull up the purchase order by completing a search. Then click on the drop down menu "**Pending**" and choose "**Canceled**." Then click "**Update Order**." If you don't click "**Update Order**" the order will not cancel.

The VCI Cancellation Policy states that classes must be canceled with two weeks notice given to the content and community provider. Excel Academy will not pay for any missed classes with the content and community provider. **Any content and community provider-specific cancellation policies are the sole responsibility of the parent.**

Backordered Items

If the ordering window has closed, the parent cannot request an alternate item for backordered or canceled items. Please complete your orders well in advance of the deadline.

Ordering Deadline

April 4th, 2025 is the deadline for the parents to get PO requests submitted for review. ToRs will submit all approved orders requests no later than April 18, 2025. 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.

Intervention

The state of California requires every public school to have a *Multi-Tiered System of Support (MTSS)* in place to help students reach state standards. (Link provided: [CDE's Definition of MTSS](#))

WIN Interventions:

What I Need (WIN) interventions provide quality instruction & progress monitoring for students who are performing below grade-level standards on local, state, and/or ToR proctored assessments.

WIN Assignments:

Students with qualifying data are required to choose an intervention from our WIN Menu and complete weekly WIN assignments per the Acknowledgement of Responsibilities signed with the Master Agreement. Failure to complete intervention assignments for a period of five school days or more may result in a PIN.

WIN Live (Small Group Instruction):

Students will regularly attend required intervention classes (WIN Live, ELD Live, &/or Essentials courses) as assigned. Failure to attend intervention classes for a period of five school days or more may result in a PIN.

Student Success Team (SST)

The Student Success Team (SST) is a group that meets to develop strategies and interventions to assist an individual student with academic, and/or behavioral needs. The support provided is personalized for each student. The SST sets goals and closely monitors student progress throughout the year. If you would like an SST meeting for your student, please reach out to your ToR.

504 Plans

504 Plans provide eligible students with accommodations to ensure equitable access to their education and/or their learning environment. Section 504 is a federal law, which prohibits discrimination against individuals with a disability. This law defines an individual with a disability as anyone who exhibits any of the following conditions:

A mental or physical impairment which substantially limits one or more major life activities. The major life activities include, but are not limited to, caring for one's self, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning,

working, eating, sleeping, standing, lifting, bending, reading, concentrating, thinking, speaking, and/or major bodily functions.

To be covered under Section 504, a student must be between 3 and 22 years of age (depending on the program as well as state and federal law), and must have a disability that *substantially* limits the child in one or more major life activities or major bodily functions. [34 C.F.R. §104.3(k)(2)]

If you have questions regarding 504 Plans, please contact your ToR or the 504 Coordinator, April Saade at asaade@excelacademy.education.

If a student enters Excel Academy with an existing 504 Plan, the plan will be reviewed and confirmed with the student, parent/guardian, and our team. In addition, all 504 Plans will be reviewed annually to ensure they are current and properly meeting student needs.

Special Education

At Excel Academy, we are committed to serving all students, including those with identified special needs. Special education and related services are available at no cost to enrolled students with Individualized Education Plans (“IEPs”) and include a full continuum of services and supports. We receive guidance regarding special education best practices, policies, and procedures from the Sonoma County Charter SELPA. At any point, if parents/guardians or members of a student’s school team suspect that a disability is impacting a student’s ability to adequately progress within the general education environment, they should contact their ToR for more information regarding the special education referral process.

For more information regarding the Special Education department, please [click here](#) to read the Special Education Handbook.

Certificate of Completion (COC)

Students with identified unique needs related to a significant disability condition are eligible for an alternate High School completion option, per their active Individualized Education Plan (“IEP”). If it is determined by the IEP team that the appropriate High School completion path is a Certificate of Completion (“COC”), the student will be required to meet the following requirements:

1. 30 Credits Language Arts
 - a. Three years/six semesters
2. 20 Credits Mathematics

- a. Two years/four semesters
- 3. 10 Credits Life Science
 - a. One year/two semesters
- 4. 10 Credits Physical Science
 - a. One year/two semesters
- 5. 20 Credits Social Studies
 - a. Two years/four semesters
- 6. 20 Credits Physical Education (Unless the pupil has been exempted pursuant to the provisions of EC Section 51241.)
 - a. Two years/four semesters
- 7. 25 Credits Employment, Education, and Life Skills (Minimum five credits/one semester required in each category)
 - a. Two and a half years/five semesters

Assessments

Report Cards

Students in grades TK- 12 will receive report cards to document progress and growth following the end of each semester with Excel Academy. The grades administered on the report card are final as determined by the ToR and the administration.

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 tools and reteaching to understand concepts being taught, or works at a slower 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.**

6th - 12th Grade Report Cards - Required

Letter grades are based on the student’s overall performance.

1. Student’s overall academic performance in each area (ELA, math, social studies, science, physical education, and high school specific courses) is evaluated using the following criteria:
 - a. Observation
 - b. Graded student work
 - c. Chapter quizzes/tests
 - d. Parent/guardian input
 - e. Discussion at Learning Period meetings
 - f. Professional judgment

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 mastering of the subject.
Achievement of superior quality.
Credit will be issued for high school courses.**

99 - 100 = A+

93 - 98 = A

90 - 92 = A-

Consistent performance in achievement beyond the usual requirement.

**Achievement of high quality.
Credit will be issued for high school courses.**

**88 - 89 = B+
83 - 87 = B
80 - 82 = B-**

**Performance meets grade-level standards and expectations.
Achievement suggests sufficient understanding of the subject/course.
Credit will be issued for high school courses.**

**78 - 79 = C+
73 - 77 = C
70 - 72 = C-**

**Minimally acceptable performance of course-level material.
Achievement suggests below average understanding.
Credit will be issued for high school courses, but will not provide a-g designation.**

**68 - 69 = D+
63 - 67 = D
60 - 62 = D-**

**Achievement is at a level insufficient to demonstrate understanding
of the basic elements of the course, and will not count towards
graduation requirements.
Zero credit will be issued for high school courses.**

59 and below = F

*****Students taking courses from a community provider issuing a transcript and/or
Community College courses will be graded by the instructor teaching the course.**

EACS requires report cards for TK - 12th grade students. Exception to numerical grades:

- a. Approved students taking high school courses must earn letter grades for those courses

Grades and GPA

A GPA stands for a student's grade point average. A student's GPA is the total of all high-school course grades earned in high school and is divided by the total number of credits completed. Excel Academy requires students to earn a minimum of a D to pass a class and earn credit toward graduation. A total of 220 credits must be earned in order to graduate high school. Excel

Academy reports grades on a 4.0 scale with additional points being given for Honors, Advanced Placement, and Concurrent Enrollment courses.

State and Local Assessments

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.

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/alternative assessments offered. Students who do not participate in the required assessments will be issued a Progress Improvement Notification (PIN) for each missed assessment. Upon the third Progress Improvement Notification, the student is subject to involuntary withdrawal.

Effective in 2022, when students do not participate in CAASPP testing our charter school will suffer significant penalties when reporting the school's performance measurement on the California state dashboard. 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. 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 or county office of education is evaluating whether to approve and/or renew a school's charter 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 (CAASPP) is the used method, and results are indicated on the California School Dashboard and System of Support. The CA 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/>). **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. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families.**

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

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 English language proficiency (ELP) (cde.ca.gov).

- Grades K-12
- 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 (Assessment will be administered by trained proctors.)
- 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. Parents may also access test results through the parent portal.
-

***See [Title I & Title III](#) section for more information on English Learner Curriculum*

Criteria for Reclassification to Fluent English Proficient (RFEP)

In order to be reclassified to fluent English proficient (RFEP) 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 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
- Information for the SBAC ELA/MATH/CAST will be emailed to parents in early spring.
- Technology usage by students is prohibited in the designated testing rooms.
- During testing, cellphones are highly discouraged, and *no* electronic devices are allowed at the test sites, including smart watches.
- If testing in person, parents are notified when students have completed testing by a proctor at the site.
- If testing in person, parents are welcome to stay in the waiting area at most sites, but are not allowed in the testing rooms.
- If testing in person, a Photo ID may be *required* at pick-up.
- If testing in person, siblings picking up students **MUST** be old enough to have a photo ID and must be identified at the time of check-in.
- If testing in person, 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.

Testing Resources

For additional information regarding assessments, please refer to Excel Academy's website under *Assessments*. For **CAASPP AND ELPAC practice tests**, please refer to the *Assessment* tab.

Smarter Balanced Assessment Consortium (SBAC) and the California Standards Tests (CAST) for Science

There are four major types of questions that students may see: multiple choice, multiple response, short answer, and performance assessments. We encourage you to explore and discuss the practice tests with your students. 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.

Additional Resources:

- Utilize the i-Ready personalized lessons to strengthen skills and close learning gaps.
- EACS test prep packets are provided to students in grades 3-8, and 11 in ELA and math.
- EACS virtual test prep sessions will be offered in February and March.

Physical Fitness Test (PFT)– 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 the spring - Your ToR will provide all necessary information and details regarding testing
- The PFT is administered by ToRs who will provide Excel Academy's Director of Assessment and Accountability with the results for each student tested.
- Students with testing accommodations will have them 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

*The Healthy Fitness Zone standards are available at the following California Department of Education Website: [FITNESSGRAM: Healthy Fitness Zone Charts](#).

i-Ready Benchmark Assessments – Computer-Based Tests

i-Ready benchmark assessments are adaptive diagnostic tests that will indicate mastery and identify learning gaps for students in grades K-11. This required assessment will be proctored virtually in the fall, winter, and spring by the ToRs to provide staff and parents pertinent knowledge to assist with academic support and guidance, and in the spring, to determine growth and goals prior to state testing.

- Test Administration *****ToRs will send out specific information regarding the available test sessions and specific testing dates.**
 - Testing window #1 - Fall - Testing takes place when school begins for ALL K-11th GRADE STUDENTS
 - Testing window #2 - Winter - WIN AND SHORELINE STUDENTS (REQUIRED) & THOSE WHO CHOOSE TO TAKE A MID-YEAR ASSESSMENT
 - Testing window #3 - Spring - Testing is in March for ALL K - 11th GRADE STUDENTS
- The benchmark assessments will be administered virtually by the ToR within the set testing window, unless a different method or timing of administration is required per the student's active IEP or 504 Plan. Newly enrolled students will be required to take the i-Ready assessments upon enrollment.
- ToRs must make sure each student on their roster (grades K-11) has completed the assessments within the set testing windows. Individualized follow-up lessons will be automatically created for students once the assessments are completed. These lessons are highly encouraged for additional support to promote growth and progress for students scoring in 8th grade or below. Ask your ToR for specific details.
- Students who test without ToR supervision will need to retake the assessment(s).

*iReady requirements for Shoreline and WIN students will be discussed directly with the parent. There will be a required mid-year i-Ready assessment to check student progress.

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 assessment requirements will result in PINs being issued to the student.** Alternative paper pencil assessments are subject to be given virtually by the ToRs only if in-person meetings/testing sites are not in place. Please refer to Excel Academy's PIN Policy.

High School Assessments

Final exams - If a high school course requires a final exam, the ToR will proctor the exam.

Field Trips

Excel Academy offers a wide variety of field trips and community events. Field trips may consist of historical reenactments, plays, musicals, libraries, museum tours, and so much more. Excel Academy's Field Trip Coordinator will be working throughout each school year to provide engaging, interactive, and educational opportunities for students and parents to participate in and around their community. Participation on the part of students and parents is optional. Excel Academy does not provide transportation to and from these events. Parents/Guardians must be in attendance with their student(s) on Excel Academy field trips and at events. The out-of-pocket parent/non student sibling (not of school age)/student tickets must be paid during registration. If students are using IFs, the amount will be removed at the close of the registration window.

California Education Code Section 35330(d) *All persons making the field trip or excursion shall be deemed to have waived all claims against the district, a charter school, or the State of California for injury, accident, illness, or death occurring during or by reason of the field trip or excursion.* **ARTICLE 13. Excursions and Field Trips [35330 - 35332]**

Instructional Funds for Field Trips

Students may use IFs to register for field trips. Your ToR will be notified to pull those funds at a later time. Please take note of the amount that will be pulled and make sure you have funds to cover the trip. If you do not have enough funds, you will need to pay out of pocket or forfeit your spot.

Students who use IFs for field trips must provide evidence of learning to their ToR for that day. This evidence can be used as a work sample for that learning period.

Refunds

There will be no refunds for purchased tickets once the registration and/or deadline has closed, and no late registrations are honored. Please reach out to your ToR with any questions regarding field trips and registration deadlines. If a field trip or event is canceled, Excel Academy cannot guarantee a refund nor guarantee the same field trip will be rescheduled. Any refund extended to Excel Academy will be given to families.

Clubs, Programs, Student, & Parent Opportunities

GATE - Gifted and Talented Program

The GATE program at Excel Academy provides specialized educational opportunities for 3rd-8th grade students who demonstrate exceptional abilities or potential in academics, creative pursuits, and/or problem-solving. The program is designed to meet the specific learning needs of gifted and talented students, allowing them to develop their abilities to the fullest extent.

The GATE Program hosts in-person enrichment activities including STEM projects, field trips, and competitions. We recognize that gifted students often have unique social and emotional needs. The GATE program encourages the development of healthy peer relationships, supports students in coping with perfectionism and academic pressure, and fosters a sense of belonging with like-minded peers.

GATE testing is provided annually and participation is voluntary.

eSports

Excel Academy's eSports club focuses on sportsmanship, honor, respect, self control, self respect, as well as mutual respect for other gamers. The eSports club allows our students to improve their skills in gaming, teamwork, communication, and student collaboration. Students in grades 9-12 who are interested in competing in a fun, online environment are welcome to join.

The evidence is in, eSports is a fast growing industry! Colleges are looking for students with eSports experience. Additionally, playing video games can sometimes be isolating or played with people we don't know. This club helps to build student relationships under the advisement of a credentialed Excel Academy teacher.

Parent Advisory Committee

Excel Academy sponsors a Parent Advisory Committee (PAC), comprised of parents from the Excel Academy community, which meets regularly as is dictated by Excel Academy and serves to address and recommend changes to the Excel Academy Administration regarding specific areas of school operations and community. This includes but is not limited to:

- Curriculum/Instruction/Assessment
- Community Connection and Events
- Fundraising and Grants
- School Program Development

The PAC shares information about the school with the parent community, invites feedback and ideas from the parents on the school, and involves students in the school conversation. Dates of future meetings will be posted at least one month in advance. Certificated and classified staff members are welcome and encouraged to attend if their duties permit. PAC is chaired by the Excel Academy Director or their designee.

Excel Academy believes that active parent, student, and employee participation in school operations will help foster the sustainability of our school. The PAC will play an important role in making Excel Academy even more responsive to staff, student, and parent needs and provide for continual improvement. This ensures that Excel Academy staff members practice open and positive communication with families. To that end, we welcome any inquiries into parent participation in the committee. Please use the following link to provide parent feedback: [Click here to complete the PAC feedback form.](#)

Student Council

Excel Academy Student Council is a both a junior high and high school elective class for students from grades 7-12 that develops, strengthens, and encourages students to become everyday school leaders. Students meet virtually twice weekly and are trained on how to develop characteristics of a successful leader and apply these skills to their own life. Student council members help develop quarterly events such as our annual beach clean-up day as a way to give back to the community. These students choose to take the next step forward in maintaining Excel Academy's high standards and dedication to serving our families well.

Leaders are not one-size fits all, and whether you are quiet and more introverted, or enjoy talking with everyone, there are many leadership opportunities for every student.

Theater Arts

The Excel Academy Theater Arts program is a new and exciting program for students of all ages! Each week students delve into the captivating world of theater, dance, and voice. In a supportive and engaging atmosphere, students will not only have a blast, but also forge lasting friendships and enjoy the countless rewards of a well-rounded theater education. At the end of each semester, they'll showcase their newfound skills in a dazzling musical theater production, complete with costumes, sets, stage lights, and resounding applause.

A theater education fosters creativity and self-expression, empowering students to confidently explore their unique artistic voice. Additionally, it cultivates essential life skills such as self-confidence, teamwork, communication, and empathy. Most importantly, participation in EACS Theater Arts provides the opportunity to meet other Excel families and be a part of this nurturing, artistic community.

Work Permits

Students interested in requesting a work permit must comply with Excel Academy's policy.

- Maintain full-time enrollment at Excel Academy (5 or more courses)
- Maintain attendance (attend classes on a regular basis and attend all Learning Period meetings with ToR, etc.)
- Maintain a 2.0 GPA average
- Display acceptable behavior in school and out of school
- Submit all coursework samples on time each Learning Period.

*New students must provide current report cards and/or official transcripts, behavior records, and attendance records from previous school.

General Work Permits:

All students under 18 years of age that would like to obtain a work permit shall follow these directions (not for Entertainment Work Permits, see the directions below for Entertainment Work Permits).

- Parents may print the B1-1 form (Statement of Intent to Employ a Minor & Request for a Work Permit) from their parent portal.

- Parent/student must complete their sections on the document, and then have the employer complete their section, prior to emailing it to Excel Academy for authorization.
- All parent and employer sections must be completed for Excel Administration to review
- Once the document is completed by the above mentioned parties, student will email it to Excel Academy's Registrar office: registrar@excelacademy.education.

*Parents/students must adhere to the state and federal laws that pertain to child labor as well as the school policies mentioned above.

Entertainment Work Permits:

- Application to work in the entertainment industry can be found on the CA Dept. of Industrial Relations website <https://www.dir.ca.gov/DLSE/OnlinePermits.htm>.
- Parent/student must complete their sections on the document and then email it to Excel Academy's Registrar office registrar@excelacademy.education.

*Parents/students must adhere to the state and federal laws that pertain to child labor as well as the school policies mentioned above.

Outline of Violations that May Result in Involuntary Removal

Attendance

Regular attendance is very important to the success of both your student and our school. Charter schools are funded based on "average daily attendance" or ADA. "Attendance" means when a student is engaged in educational activities required of them by the school, on days when school is actually taught. (5 C.C.R. 11960(a).)

Since our schools are non-classroom-based instructional programs, ADA is calculated based on the work completed by the student on school days and submitted by the due dates established in the independent study Master Agreement. The assigned teacher subsequently assesses the student's work to determine whether the time value ascribed to the assigned educational activities amount to a full day of attendance. It's important to stick to a regular work schedule/calendar so your student can clearly identify daily engagement each school day in required educational activities to an extent sufficient to constitute at least one day of time value. When determining the time value of a student's work, the teacher will consider each student individually and may adjust the assignments accordingly.

In California, each person between 6 and 18 years of age, unless otherwise exempt by law, is required to attend school full-time with regular and punctual attendance, and schools are required to enforce this compulsory attendance law. (See Ed. Code, § 48200 *et seq.*) A student's failure to complete assignments on-time may subject the student to discipline, removal from the school, and/or being classified as truant and reported to the proper authorities. Please review the detailed Attendance, Progress Improvement Notification (PIN) and Involuntary Withdrawal policy found in the EACS Handbook.

Governing Board Policies

In addition to attendance, the parent and student must abide by all board approved policies. These policies include, but are not limited to:

- The Academic Integrity Policy
- The Civility Policy
- The Acceptable Use Policy

The complete list of all Board-approved policies as well as how to access them may be found at <https://excelacademy.education/our-board/board-policies>

Behavior

Excel Academy takes behavior violations seriously and will not tolerate inappropriate behavior. Students who cheat, cause disruption in Excel Academy classes or events, use inappropriate language, demonstrate dishonesty, or plagiarize will receive a Behavior Improvement Plan (BIP) and are subject to consequences such as failing a class. Repeat offenses of these violations may result in involuntary withdrawal.

A student may be suspended or expelled for prohibited misconduct if the act is related to school activity or school attendance occurring at any time. A list of these offenses are outlined in Education Code Section 48900 *et seq.*, and are detailed in Excel Academy's charter petition.

Behavior Improvement Plan (BIP)

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

For students who commit violations such as [academic 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, 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.

Acknowledgement Of Responsibilities

I, the student, agree to:

- The terms as outlined in the Master Agreement.
- Complete coursework as outlined in the Master Agreement and as assigned by the credentialed teacher.
- Participate in a full academic school day, with the following average hours as guidelines: TK-K 4-hours/day , Grades 1st -8th 5-hours/day, Grades 9th-12th 6-hours/day.
- Attend all required meetings as scheduled and on-time.
- When in a virtual setting I agree to have my camera on and show my face.

- Come prepared to each Learning Period (LP) meeting with the body of work assigned by your ToR. The work should be complete and legible, with clear feedback/grades provided
- Stay on pace to complete my assignments each week. Should I need additional support, I will request it from my ToR.
- Students registered in ETL courses or the Virtual Pathway agree to:
 - Arrive promptly and come prepared each school day to submit or complete assignments as directed by the classroom teacher. Submitted work should always be complete and legible.
 - Attend all scheduled classes, conferences and meetings, actively participating and engaging with participants.
- Complete intervention assignments as required (WIN, ELD, etc). Failure to complete intervention assignments for a period of five school days or more may result in a PIN.
- Regularly attend required intervention classes (WIN Live, ELD Live, &/or Essentials courses) as assigned. Failure to attend intervention classes for a period of five school days or more may result in a PIN.
- I understand that failure to complete intervention requirements for a period of five school days or more may result in a PIN.
- Complete all required assessments, including the following: CAASPP (ELA, math, and science), i-Ready Diagnostic Assessments, grade-level paper/pencil benchmark assessments, Physical Fitness Testing (PFT), Initial and Summative ELPAC assessments, Algebra 1 Readiness Assessment (students entering Algebra I only), intervention assessments, and course assessments.
- Conduct myself in a respectful, responsible, and safe manner at all Excel Academy functions, including virtual forums. I understand that my participation in school functions is a privilege which may be revoked if my behavior is not acceptable.
- Use school-issued technology for school-related learning and assignments only, treating it with care and respect.
- If my behavior does not comply with school expectations I may receive a Behavior Improvement Plan (BIP). Three or more unexcused absences will result in a Progress Improvement Notification (PIN).

** Failure to complete mandated school-wide assessments may result in Progress Improvement Notifications (PINS) being issued. Please see the Parent Handbook for a description of the Progress Improvement Notification (PIN) process.*

I, the parent/guardian agree to:

- Prompt, timely, and effective communication with staff within 48 hours, excluding weekends and school holidays.
- Provide necessary documentation or information to the school in order to record attendance in compliance with applicable law.

- Provide the school with all required documentation for continued enrollment, such as proof of residency.
- Provide Excel Academy with in-progress grades if my student enrolls 25 days or more after the start of the semester and understand that in-progress grades will be combined with grades earned at the previous school to award the final semester grade. Request support from my student's assigned ToR or teacher when needed.
- Provide Excel Academy with a copy of either an unofficial or official transcript.
- Provide transportation to my student's scheduled meetings and school assessments.
- Monitor my student's behavior in all school-related classes or activities.
- Ensure my student complete mandated school-wide assessments such as: CAASPP (ELA, math, and science), i-Ready Diagnostic Assessments, grade-level paper/pencil benchmark assessments, PFT, Initial and Summative ELPAC assessments, Algebra 1 Readiness Assessment (students entering Algebra I only), intervention assessments, and course assessments.
- Support my student in the completion of intervention assignments as required (WIN, ELD, etc). Failure to complete intervention assignments for a period of five school days or more may result in a PIN.
- Ensure regular student attendance in required intervention classes (WIN Live, ELD Live, &/or Essentials courses) as assigned. Failure to attend intervention classes for a period of five school days or more may result in a PIN.
- Conduct myself in a respectful, responsible, and safe manner at all Excel Academy functions. I understand that my participation in school functions is a privilege which may be revoked if my behavior is not acceptable.
- Use instructional funds for approved requests for VCI courses/classes for participation only on instructional days during the current school year.
- Return all school-issued materials upon disenrollment, involuntary withdrawal, or the designated due date. All school purchased materials will be returned to Excel Academy. All materials are the property of Excel Academy and are on loan to the student while enrolled.

Personalized Path:

- Be responsible for the daily teaching, monitoring, verification, and assessment of all subjects/courses outlined in the Master Agreement.
- Be responsible for the adequate academic progress of my student as determined by the ToR. If a tutor is needed, the tutor's instruction does not supersede my responsibility for the day-to-day instruction and progress monitoring of my student.
- Attend Learning Period (LP) meetings at a mutually agreed upon location. If a make-up meeting is scheduled by the parent/guardian, it needs to take place within 5 school days of the original meeting. If this does not occur, a PIN may be issued. Parents/guardians that reschedule more than twice per calendar year may be subject to a Progress Improvement Notification (PIN).

- Provide the body of work for each subject/course assigned according to the pacing guide and all necessary paperwork.
- Ensure the student's coursework aligns with grade-level standards, If the ToR finds that the student's course of study is missing key content standards and provides additional assignments/curriculum, the parent is responsible to ensure that content is covered.
- Upon request, provide work samples every 5 school days to designated staff.
- High school students or students taking high school-level coursework must actively attempt and complete a minimum of at least 25-30 credits per semester in order to maintain earning sufficient credits toward graduation (20-25 credits at Excel Academy if the student is participating in concurrent enrollment).
- Junior high students must receive prior approval to enroll in a high school math and/or world language course for high school credit. Credits do not count toward the required credits for graduation.

Virtual Path or ETL Classes

- Provide the needed support for my student to access online learning and actively participate in class. (Ensure students can login to class and curriculum platforms, as well as access needed classroom materials and checklists.)
- Ensure my student has the camera on and their face is in view.
- Ensure my student completes and uploads all assigned work by the due date set by the classroom teacher.
- Any communication in the chat will be on topic, follow school policies, and be appropriate for the school setting.
- Read all school emails, responding to my student's teacher promptly.
- Oversee my student during school hours, ensuring my student is actively engaged during class time and completing all necessary assignments each school day.
- Provide a quiet atmosphere free from distractions such as televisions, cell phones, and gaming devices. Redirect student attention to the class when necessary.

Attend all required school meetings with the student, on time and as scheduled. If any school meeting is held virtually, I agree to show my face and my student's face on camera during the meeting.

- Notifying school personnel at least 24 hours prior if cancellation or change is necessary.
- Failure to do so for a period of 5 school days or more, will result in a Progress Improvement Notification (PIN).

The charter school has an obligation to provide a Free Appropriate Public Education (FAPE)

to every student with an Individualized Education Program (IEP). If my student has an IEP and does not access the special education and related services as outlined in the IEP, the charter school will contact me to discuss the matter and may be required to schedule an IEP team meeting. The IEP team will discuss the reasons for missed or canceled sessions as they relate to the student's unique needs. Parent participation is expected to address the student's access to necessary support and services.

Progress Improvement Notification Procedures

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.

Progress Improvement Notification Policy

First Progress Improvement Notification (PIN)

If a parent or student fails to meet the responsibilities outlined in the Master Agreement, Acknowledgement of Responsibilities (AOR), or Independent Study Policy, the school will send a PIN letter to the parent/guardian informing the family that the student/parent has failed to meet the minimum standards of independent study and/or the governing Board policies. The letter will include the reason for the notification so the parent/guardian and student are aware that they are not fulfilling their responsibilities with the school.

Excel Academy defines a missed assignment as anything that fails to meet the Acknowledgement of Responsibilities (AoR) as related to academic progress and may include but are not limited to the following infractions: missing a scheduled meeting, failing to communicate with the Teacher of Record or other school personnel, failing to meet adequate academic progress, lacking adequate work samples, and/or failing to sign required documents.

The reason for the notification is outlined in the PIN letter, per the credentialed ToR, and the student must complete the assignment within the designated time frame. Verification of completion of the identified assignment is required to ensure the student is making satisfactory progress and meeting their goals.

If the reason for the notification is that the parent/guardian or student did not attend a Learning Period meeting, a follow-up Learning Period meeting must occur within five school days.

Second Progress Improvement Notification (PIN) - Attendance Improvement Meeting (AIM)

If a parent or student fails to meet the responsibilities outlined in the Master Agreement, Acknowledgement of Responsibilities (AOR), or Independent Study Policy for a second time within the same school year, the school will send a PIN 2 letter to the parent/guardian informing the family that the student has failed to meet the minimum standards of independent study and/or the governing Board policies. The letter will include the reason for the notification so the parent/guardian and student are aware that they are not fulfilling their responsibilities with the school.

To determine that independent study is in the best interest of the student, an Attendance Intervention Meeting (AIM) may be held with the school's educational team within five days. The purpose of the AIM will be to review the student's written agreement, and reconsider the independent study program's impact on the pupil's achievement and well-being, consistent with the evaluation for satisfactory progress as defined by the Board policy. If the student and parent/guardian elect to stay enrolled, the team will develop an agreement to help support the student to make satisfactory educational progress, including additional resources and support. If the parent/guardian or student does not attend the scheduled Attendance Intervention Meeting (AIM), the meeting will be held with the teacher and school designee, and a third PIN may be issued for failure to attend the required AIM meeting.

If the reason for the notification is that the student failed to complete an identified academic assignment outlined in the PIN letter per the credentialed ToR, the student must complete the academic assignment within five school days.

If the PIN was issued due to a missed LP meeting, a follow-up meeting must occur within five school days of the missed meeting. This meeting will take place to ensure the student has begun making satisfactory progress. If the parent/guardian or student does not attend the scheduled Attendance Intervention Meeting (AIM), the meeting will be held with the teacher and school designee, and a third PIN may be issued for failure to attend the required AIM meeting.

If the student is served under a Section 504 Accommodation Plan and the Attendance Intervention Meeting (AIM) team concludes that the area identified for improvement in the PIN may be related to the student's disability, a Section 504 meeting may be scheduled in conjunction with an Attendance Intervention Meeting (AIM) to ensure that both the General Education requirements and the 504 Accommodation Plans are addressed.

Third Progress Improvement Notification (PIN) - Internal Evaluation

If a parent or student fails to meet the responsibilities outlined in the Master Agreement, Acknowledgement of Responsibilities (AOR), or Independent Study Policy for a third time within the same school year, the school will send a letter to the parent/guardian informing the family that the student has failed to meet the minimum standards of independent study and/or

the governing Board policies. The letter will include the reason for the notification so the parent/guardian and student are aware that they are not fulfilling their responsibilities with the schools. When any student fails to complete three (3) identified assignments (or fails to meet the responsibilities in the Master Agreement Acknowledgement of Responsibilities (AOR), or Independent Study Policy three times) in a school year, the Principal or designee shall conduct an internal evaluation to determine whether it is in the best interest of the student to remain in independent study. If the evaluation finds that it is not in the student's best interest to remain in independent study, the student may be removed in accordance with the process outlined below.

If the student is served under an Individualized Education Plan (IEP) and the Attendance Intervention Meeting (AIM) team concludes that the area identified for improvement in the PIN may be related to the student's disability, the AIM team will share with the SpED Department to review and determine if an IEP meeting needs to be scheduled in addition to an Attendance Intervention Meeting (AIM).

Behavior Improvement Plan (BIP)

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

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

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

Violations that may result in suspension or immediate expulsion 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.

Involuntary Withdrawal Policy

In accordance with Education Code Section 51747 and the Charter School's Board policy on independent study, after three (3) missed identified assignments, an internal evaluation is held by the Principal to determine whether it is in the best interest of the student to remain in independent study. If it is determined that it is not in the student's best interest to remain in independent study, the Charter School may involuntarily withdraw the student after the Charter School follows the requirements outlined in the Progress Improvement Notification Policy and only after providing notice and an opportunity for a parent, guardian, educational rights holder to request a hearing prior to any involuntary withdrawal as forth herein.

Procedures

Grounds for Involuntary Withdrawal of Students

As used herein, "involuntarily withdrawn" includes disenrolled, removed, dismissed, transferred, or terminated, but does not include removals for misconduct which may be grounds for suspension or expulsion as outlined in the petition. Students may be involuntarily withdrawn for reasons including, but not limited to, failure to comply with the terms of the student's independent study Master Agreement, Acknowledgement of Responsibilities (AoR), and the Independent Study Policy, pursuant to Education Code Section 51747(c)(4).

Withdrawal Procedures

No student shall be involuntarily withdrawn by the Charter School for any reason unless the parent/guardian of the student has been provided written notice of intent to withdraw the student no less than five (5) school days before the effective date of the action. The written notice shall be in the native language of the student or the student's parent/guardian or, if the student is a foster child or youth or a homeless child or youth, the student's educational rights holder, and shall inform the student, the student's parent/guardian, or educational rights holder of the basis for which the student is being involuntarily withdrawn and the student's parent, guardian, or educational rights holder's right to request a hearing to challenge the involuntary

removal. If the student's parent, guardian, or educational rights holder requests a hearing, the student shall remain enrolled and shall not be withdrawn until the Charter School issues a final decision.

Written notice of the hearing shall be forwarded to the student and the student's parent/guardian at least ten (10) calendar days before the date of the hearing.

Written Notice to Withdraw

The Executive Director or designees shall send written notice of the decision to withdraw, including findings of fact, to the student and student's parent/guardian. This notice will also include: (a) notice of the specific violation committed by the student;

Special Procedures for the Consideration of Involuntary Withdrawal of Students with Disabilities

1. Procedural Safeguards/Manifestation Determination

Within ten (10) school days of any decision to change the placement of a child with a disability due to violation of the Master Agreement or independent study policy, the Charter School, the parent, and relevant members of the IEP team or 504 team shall review all relevant information in the student's file, including the child's IEP or 504 Plan, any teacher observations, and any relevant information provided by the parents to determine:

- a. If the missed assignments/school avoidance in question was caused by, or had a direct and substantial relationship to, the child's disability; or
- b. If the missed assignments/school avoidance was the direct result of the local educational agency's failure to implement the IEP or 504 Plan.

If the Charter School, the parent, and relevant members of the IEP team or 504 Team determine that either of the above is applicable for the child, the conduct shall be determined to be a manifestation of the child's disability.

If the Charter School, the parent, and relevant members of the IEP team or 504 Team make the determination that the conduct was a manifestation of the child's disability, the IEP/504 Team shall:

- a. Review the student's IEP and determine if the student requires any additional supports, goals, or services to address the behavior(s) in question; and

- b. Return the child to the placement from which the child was withdrawn, unless the parent/guardian and the Charter School agree to a change of placement as part of the modification of the IEP.

The IEP team may also:

- a. Conduct a functional behavioral assessment and implement a behavioral intervention plan for such child, provided that the Charter School had not conducted such assessment prior to such determination before the behavior that resulted in a change in placement;
- b. If a behavioral intervention plan has been developed, review the behavioral intervention plan if the child already has such a behavioral intervention plan, and modify it, as necessary, to address the behavior.

If the Charter School, the parent/guardian, and relevant members of the IEP team or 504 Team determine that the behavior was not a manifestation of the student's disability and that the conduct in question was not a direct result of the failure to implement the IEP or 504 Plan, then the Charter School may apply the relevant involuntary withdrawal policy and procedures to children with disabilities in the same manner and for the same duration as the procedures would be applied to students without disabilities.

Special Education Students – PINs

A PIN IEP will be held after a total of five (5) combined PINs. During the PIN IEP meeting, the IEP Team will discuss the reasons for no-shows/missed services and/or AoR violations and will conduct a team review of the student's current IEP in order to consider the following available options

Change of placement for a current special education student, or eligibility determination for a child suspected of being a student with a disability, will be addressed by the IEP team. No student who is known to have a disability condition will be recommended for removal from the current placement unless 1) a Manifestation Determination IEP meeting is convened according to law and 2) it is determined at that meeting that the concerns warranting removal are not a manifestation of the student's disability.

For more detailed information, please refer to the EACS Special Education PIN Process Policy.

Suspension/Expulsion Procedures

For Excel Academy students within Helendale School District or Warner Unified School District please refer to the suspension policy outlined in our charter petition. A copy will be made available upon request.

As to students with special education needs, discipline will be taken, where appropriate, in conformance with applicable law.

Family Educational Rights and Privacy Act (FERPA)

The Family Educational Rights and Privacy Act (FERPA) affords parents and students who are 18 years of age or older ("eligible students") certain rights with respect to the student's education records. These rights are:

1. The right to inspect and review the student's education records within 45 days after the day the school receives a request for access.
2. Parents or eligible students should submit to the program lead/director a written request that identifies the records they wish to inspect. The program lead/director will make arrangements for access and notify the parent or eligible student of the time and place where the records may be inspected.
3. The right to request the amendment of the student's education records that the parent or eligible student believes are inaccurate, misleading, or otherwise in violation of the student's privacy rights under FERPA.
4. Parents or eligible students who wish to ask the school to amend a record should write the program lead/director, clearly identify the part of the record they want changed, and specify why it should be changed. If the school decides not to amend the record as requested by the parent or eligible student, the school will notify the parent or eligible student of the decision and of their right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the parent or eligible student when notified of the right to a hearing.
5. The right to provide written consent before the school discloses personally identifiable information (PII) from the student's education records, except to the extent that FERPA authorizes disclosure without consent.
6. One exception, which permits disclosure without consent, is disclosure to school officials with legitimate educational interests. For this purpose, a school official is a person employed by the school as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel) or a person serving on the school board. A school official also may include a volunteer or contractor outside of the school who performs an institutional service of function for which the school would otherwise use its own employees and who is under the direct

control of the school with respect to the use and maintenance of PII from education records, such as an attorney, auditor, medical consultant, or therapist; a parent or student volunteering to serve on an official committee, such as a disciplinary or grievance committee; or a parent, student, or other volunteer assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.

7. The right to file a complaint with the U.S. Department of Education concerning alleged failures by the school to comply with the requirements of FERPA. The name and address of the Office that processes FERPA complaints are:

Family Policy Compliance Office
 U.S. Department of Education
 400 Maryland Avenue, SW
 Washington, DC 20202

FERPA permits the disclosure of PII from students' education records, without consent of the parent or eligible student, if the disclosure meets certain conditions found in §99.31 of the FERPA regulations. Except for disclosures to school officials, disclosures related to some judicial orders or lawfully issued subpoenas, disclosures of directory information, and disclosures to the parent or eligible student, §99.32 of the FERPA regulations requires the school to record the disclosure. Parents and eligible students have a right to inspect and review the record of disclosures. A school may disclose PII from the education records of a student without obtaining prior written consent of the parents or the eligible student:

- To other school officials, including teachers, within the educational agency or institution whom the school has determined to have legitimate educational interests. This includes contractors, consultants, volunteers, or other parties to whom the school has outsourced institutional services or functions, provided that the conditions listed in §99.31(a)(1)(i)(B)(1) - (a)(1)(i)(B)(2) are met.
- To officials of another school, school system, or institution of postsecondary education where the student seeks or intends to enroll, or where the student is already enrolled if the disclosure is for purposes related to the student's enrollment or transfer, subject to the requirements of §99.34.
- To authorized representatives of the U.S. Comptroller General, the U.S. Attorney General, the U.S. Secretary of Education, or State and local educational authorities, such as the CDE. Disclosures under this provision may be made, subject to the requirements of §99.35, in connection with an audit or evaluation of Federal- or State-supported education programs, or for the enforcement of or compliance with Federal legal requirements that relate to those programs. These entities may make further disclosures

of PII to outside entities that are designated by them as their authorized representatives to conduct any audit, evaluation, or enforcement or compliance activity on their behalf.

- In connection with financial aid for which the student has applied or which the student has received, if the information is necessary to determine eligibility for the aid, determine the amount of the aid, determine the conditions of the aid, or enforce the terms and conditions of the aid.
- To state and local officials or authorities to whom information is specifically allowed to be reported or disclosed by a State statute that concerns the juvenile justice system and the system's ability to effectively serve, prior to adjudication, the student whose records were released, subject to §99.38.
- To organizations conducting studies for, or on behalf of the school, in order to: (a) develop, validate, or administer predictive tests; (b) administer student aid programs; or (c) improve instruction.
- To accrediting organizations to carry out their accrediting functions.
- To parents of an eligible student if the student is a dependent for IRS tax purposes.
- To comply with a judicial order or lawfully issued subpoena.
- To appropriate officials in connection with a health or safety emergency, subject to §99.36.
- Information the school has designated as "directory information" under §99.37.

Directory information, which is information that is generally not considered harmful or an invasion of privacy if released, can also be disclosed to outside organizations without a parent's prior written consent. The primary purpose of directory information is to allow the school to include information from your child's education records in certain school publications.

Examples include:

- A playbill, showing your student's role in a drama production
- An annual yearbook
- Honor roll or other recognition lists
- Graduation programs

Outside organizations include, but are not limited to, companies that manufacture class rings or publish yearbooks. If you do not want the school to disclose any or all of the types of information designated below to outside organizations as directory information from your child's education records without your prior written consent, you must notify the school and "opt out" of the directory.

Any and all of the following items of directory information relating to a student may be released to a designated recipient unless a written request is on file to withhold its release:

- Name

- Address
- Date of birth
- Dates of attendance (*e.g.*, by academic year or semester)
- Current and previous school(s) attended
- Degrees and awards received

In addition, two federal laws require a school receiving assistance under the Elementary and Secondary Education Act of 1965, as amended, to provide military recruiters, upon request, with the following information: names, addresses and telephone listings, unless parents have advised the school that they do not want their student's information disclosed without their prior written consent.

Title IX Notice of Nondiscrimination

Excel Academy is committed to providing an educational and work environment that is free from discrimination and harassment, including discrimination and harassment based on any protected category, and an environment free from retaliation for participation in any protected activity covered by this policy. Excel Academy will ensure equal rights and opportunities in accessing education programs, activities, and facilities and prohibits discrimination or harassment based on the following categories: race, color, religion, religious creed (including religious dress and grooming practices), national origin, ancestry, citizenship, physical or mental disability, medical condition (including cancer and genetic characteristics), genetic information, marital status, sex (including pregnancy, childbirth, breastfeeding, or related medical conditions), gender, gender identity, gender expression, age (40 years and over), sexual orientation, veteran and/or military status, protected medical leaves (requesting or approved for leave under the Family and Medical Leave Act of the California Family Rights Act), domestic violence victim status, political affiliation, and any other status protected by state or federal law. In addition, Excel Academy prohibits retaliation against a person who engages in activities protected under this policy. Reporting, or assisting in reporting, suspected violations of this policy and cooperating in investigations or proceedings arising out of a violation of this policy are protected activities under this policy.

Megan Anderson, Human Resources Specialist
 1 Technology Ste. i-811, Irvine CA 92618
 Ph: 949-387-7822
 manderson@excelacademy.education

Annual Notice of Uniform Complaint Procedures

Excel Academy has the primary responsibility for compliance with federal and state laws and regulations for students who attend our schools. We have established Uniform Complaint Procedures (UCP) to address allegations of unlawful discrimination, harassment, intimidation, and bullying, and complaints alleging violation of state or federal laws governing educational programs, the charging of unlawful pupil fees and the non-compliance of our Local Control and Accountability Plan (LCAP).

We will investigate all allegations of unlawful discrimination, harassment, intimidation, or bullying against any protected group as identified in Education Code section 200 and 220 and Government Code section 11135, including any actual or perceived characteristics as set forth in Penal Code section 422.55 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 program or activity conducted by the school, which is funded directly by, or that receives or benefits from any state financial assistance. The UCP shall also be used when addressing complaints alleging failure to comply with various other state and/or federal laws.

A pupil enrolled in a public school shall not be required to pay a pupil fee for participation in an educational activity.

A pupil fee includes, but is not limited to, all of the following:

- 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 extracurricular activity.
- A security deposit, or other payment, that a pupil is required to make to obtain a lock, locker, book, class apparatus, musical instrument, clothes, or other materials or equipment.
- A purchase that a pupil is required to make to obtain materials, supplies, equipment, or clothes associated with an educational activity.

A pupil fees or LCAP complaint may be filed anonymously if the complainant provides evidence or information leading to evidence to support the complaint.

A pupil fee complaint must be filed with the Community Collaborative Family of Schools no later than one year from the date the alleged violation occurred. A complaint of noncompliance should be filed first with the school lead/director under the Uniform Complaint Procedures. A complainant unsatisfied with the decision of the school lead/director may appeal the decision and shall receive a written appeal decision within 60 days of receipt of the complaint. Complaints other than issues relating to pupil fees must be filed in writing with the following person designated to receive complaints:

Megan Anderson, Assistant Director of Human Resources

1 Technology

Suite I-811

Irvine, CA 92618

Ph: (714) 336-4220

manderson@excelacademy.education

Complaints alleging discrimination, harassment, intimidation, or bullying, must be filed within six (6) months from the date the alleged discrimination, harassment, intimidation, or bullying, occurred or the date 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 school administrator or his or her designee.

Complaints will be investigated and a written decision or report will be sent to the complainant within sixty (60) days from the receipt of the complaint. This time period may be extended by written agreement of the complainant. The person responsible for investigating the complaint shall conduct and complete the investigation in accordance with local procedures adopted under 5 C.C.R. § 4621.

The complainant has a right to appeal our decision of complaints regarding specific programs, pupil fees and the LCAP to the CDE by filing a written appeal within 15 days of receiving our decision. The appeal must be accompanied by a copy of the originally-filed complaint and a copy of our decision.

The complainant is advised of civil law remedies, including, but not limited to, injunctions, restraining orders, or other remedies or orders that may be available under state or federal discrimination, harassment, intimidation or bullying laws, if applicable.

A copy of our UCP compliant policies and procedures is available free of charge.

Parent Liability for Student Conduct

The law states that a parent or guardian of any minor whose willful misconduct results in injury or death to any pupil or any person employed by, or performing volunteer services for a school, or who willfully cuts, defaces, or otherwise injures in any way any property, real or personal, belonging to a school or personal property of any school employee, shall be liable for all damages caused by the minor.

Further, the parent or guardian of a minor shall be liable to a school for all property belonging to the school loaned to the minor and not returned upon demand of an employee of the school authorized to make the demand.

Any school whose real or personal property has been willfully cut, defaced, or otherwise injured, or whose property is loaned to a pupil and willfully not returned upon demand of an employee of the school authorized to make the demand may, after affording the pupil his or her due process rights, withhold grades, diploma, and transcripts of the pupil responsible for the damage until the pupil or the pupil's parent or guardian has paid for the damages thereto. The school will notify the parent or guardian of the pupil's alleged misconduct before withholding the pupil's grades, diploma, or transcript.

If the minor and parent are unable to pay for damages, or to return the property, the school will provide a program of voluntary work for the minor in lieu of the payment of monetary damages. Upon completion of the voluntary work, the grades, diploma, and transcript of the pupil will be released.

Student Mental Health

Mental Health Support at Excel Academy:

- Encourage your student to participate in our schoolwide Mental Wellness Surveys. This guides our mental health support offerings through the school year.
- Attend Social Emotional Learning (S.E.L.) groups provided K-12. Contact your ToR for specific dates/times.
- Contact [Care Solace](#), a free, mental health care coordination service that can connect you with mental health care or substance abuse treatment centers, covered by your insurance or on a sliding scale.

If you have a child who may be struggling with emotions/behavior please reach out to their assigned counselor for additional support.

School Counselors:

Elementary (Grades TK-6):

Caroline Forester, cforester@excelacademy.education, PH: (619) 786-8270

Secondary (Grades 7-12):

Residing in Los Angeles, San Bernardino, Kern counties:

Larissa Allen Jefferson, lallenjefferson@excelacademy.education, PH: (657) 234-7585

Residing in Orange, Riverside, San Diego counties:

Daniel Favela, dfavela@excelacademy.education, PH: (909) 566-3186

Please click the link to view:

[Suicide Prevention Policy](#)

Charter schools serving students in grades 7-12 are required to adopt a student suicide prevention policy in consultation with school and community stakeholders and others.

Protecting the health and well-being of all students is of utmost importance to our school. The school board has adopted a suicide prevention policy which will help to protect all students through the following steps:

1. Students will learn about recognizing and responding to warning signs of suicide in friends, using coping skills, using support systems, and seeking help for themselves and friends. At the beginning of each school year, an informational pamphlet will be provided to each student's parent or guardian. It is the responsibility of each student's parent or guardian to review this information with him or her. If parents or guardians have any questions about the material, they can contact the school's appointed suicide prevention liaisons, Noell Scott & Rebecca Metoyer.
2. The school has a designated Crisis Team who provides appropriate resources and support to students, & families in crisis.
3. When a student is identified as being at risk, they will be assessed by a school employed mental health professional who will work with the student and help connect them to appropriate local resources.
4. Students will have access to county & national resources which they can contact for additional support, such as:
 - a. [Mental Health Resources by County](#)
 - b. [CalHope](#)
 - c. [The National Suicide Prevention Lifeline](#) –Dial or Text 9-8-8
 - d. [The Trevor Project](#) – 1.866.488.7386,
5. All students will be expected to help create a school culture of respect and support in which students feel comfortable seeking help for themselves or friends. Students are encouraged to tell any staff member if they, or a friend, are feeling suicidal or in need of help.

Students should also know that because of the life or death nature of these matters, confidentiality or privacy concerns are secondary to seeking help for students in crisis.

Title I & Title III

Excel Academy Charter School currently receives schoolwide assistance grants based on student/family socioeconomic status upon enrollment.. This funding is allocated for direct impact on our at-promise students including English Learners, homeless, foster, juvenile, delinquent, migratory, and any student who is working toward grade level proficiency. Title I funding provides students with the appropriate interventions and resources to improve their academic achievement and meet state standards.

[School-Parent Compact](#)

Our Parent/School Compact addresses legally required items, as well as other items suggested by parents and family members of Title I, Part A students.

[Parents Right to Know Letter](#)

If at any time your child has been taught for four or more consecutive weeks by a teacher not highly qualified, the school will notify you.

[Parent and Family Engagement Policy](#)

Excel Academy Charter Schools has developed a written Parent and Family Engagement Policy with input from Title I parents and families. Excel Academy has distributed the Policy to parents of Title I students by posting it on the school website and including it in the Parent and Student Handbook. This Policy describes the means for carrying out the following Title I parent and family engagement requirements.

Additional information may be found on the California Department of Education website.

[Title I: Improving Academic Achievement - Specialized Programs \(CA Dept of Education\)](#)

Tamara Murphy, Intervention Coordinator

Ph: 951-290-2949

tmurphy@excelacademy.education

School Site Council

The School Site Council (SSC) is an advisory board that works together to focus on school goals and student achievement for Excel Academy. This team evaluates progress made toward these goals during a two year term and helps make decisions that benefit all Excel Academy students.

The SSC brings together representatives of Excel Academy's community to:

1. Oversee the School Plan for Student Achievement (SPSA).
2. Act as an advisory board related to various school goals and student learner outcomes.
3. Provide ongoing review and modifications to the SPSA.
4. Review School budget, including the LCAP
5. Evaluate the progress made toward academic goals and student achievement.
6. Promote trust in school decisions that benefit all Excel Academy students.

The SSC consists of:

- Administrators
- Teachers of Record
- Non-teacher staff members
- Parents
- High School Students

McKinney-Vento Information

Excel Academy Charter School adheres to the provisions of the McKinney-Vento Homeless Assistance Act. We ensure that each homeless and foster youth has equal access to the same free, appropriate public education as provided to other children and youths in accordance with applicable law.

Definition of Homeless:

The California Department of Education states that the McKinney-Vento Act defines homeless children and youth as individuals who lack a fixed, regular, and adequate nighttime residence. This definition also includes:

- Children and youth who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason (doubled up or tripled up)
- Children and youth who may be living in motels, hotels, trailer parks, shelters
- Children and youth who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings
- Children and youth who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings (unsheltered)
- Migratory children who qualify as homeless because they are children who are living in similar circumstances listed above

Homeless & Foster Students' Rights

- Be immediately enrolled in school without a permanent address.

- Continue in the school that the student attended before becoming homeless
 - EACS students must reside in one of our authorized counties in order to remain enrolled.
- Enroll and attend classes while the school arranges for the transfer of required school records or documents
- Enroll and attend classes even while the school and parent seek to resolve a dispute over enrollment
- Participate in tutoring, school-related activities, and/or receive other support services
- EACS will accept and issue partial credits upon successful completion of a course, even if the class was not complete
- EACS will place student in equivalent courses to allow the student to complete the course (as available)
- If transferring in or after 11th grade students will be evaluated for graduation with the option for reduced credits or a fifth year of study.

Excel Academy will meet the McKinney-Vento and Foster Youth education rights following our regular enrollment policies. See more information at <http://www.cde.ca.gov/sp/hs/> and <https://www.cde.ca.gov/ls/pf/fy/fyedrights.asp>.

If you would like resource support, please contact your ToR or email our Intervention Coordinator, Tamara Murphy at tmurphy@excelacademy.education.

English Learners (ELs)

ELs are selected 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. Please refer to the EL Master Plan, found on the EACS website, for specific details.

- Excel Academy students are in an English Language Mainstream academic program with an English Language Development (ELD) Support Curriculum. Curriculum is supported by CLAD certified teachers. It includes academic language, speaking, listening, writing skills, and exposure to rigorous texts. Live designated instruction is provided by our certificated teachers and attendance is required for all ELs.
- Attendance of ELD Live designated instruction and meeting weekly requirements in online ELD curriculum is required. Progress in assigned ELD curriculum, as well as participation in live designated instruction, is monitored weekly. Both the home educator, and the ToR are responsible for ensuring adequate progress in ELD designated instruction and lesson assignments.

- If students do not meet weekly requirements in both ELD Live Instruction and lesson assignments, they may receive a Progress Improvement Notification (PIN).

***See Assessments section for information regarding English Learner Reclassification.*

English Learner Advisory Committee

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

- Advising the principal and staff in the development of a site plan for English learners and submitting the plan to the SchoolSite Council for consideration of inclusion in the School Plan for Student Achievement.
- Assisting in the development of the schoolwide needs assessment.
- Communicating the importance of regular school attendance.
- California Education Code, sections 35147, 52176(b) and (c), 62002.5, and 64001(a)
- California Code of Regulations, Title 5, Section 11308

School Calendar



Excel Academy Charter Schools 2024 - 2025 Academic Calendar

July						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
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August						
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29	30					

LPs	Dates
1	8/22-9/13
2	9/16-10/11
3	10/14-11/8
4	11/12-12/6
5	12/9-1/17
6	1/21-2/21
7	2/24-3/21
8	3/24-4/25
9	4/28-5/30

October						
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December						
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- Holidays**
- Sept. 2 - Labor Day
 - Nov. 11 - Veteran's Day
 - Nov. 25 - Nov. 29
Thanksgiving Break
 - Dec. 22 - January 3
Winter Break
 - Jan. 20 - MLK
 - Feb. 14-17 Presidents Day
 - Apr. 7-11 Spring Break
 - May 26 Memorial Day
 - Out of calendar holidays
7/4 and 6/19

January						
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June						
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29	30					

- Graduation
- school holidays
- end of semester

Printed & digital copies of the handbook in any language are available to be provided upon request.

EACS MAY 2024 - HANDBOOK REVISIONS

Recommended for board approval to align with new provisions and update language for clarity

<i>Section</i>	<i>Item</i>
<p><u>Section:</u> Methods of Operation and Glossary of Terms</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> ● Learning period range changed from 15-20 to 15-25 ● Days to reflect body of work changed from 15-20 to 15-25
<p><u>Section:</u> School Policies, Procedures & Regulations</p>	<p><i>Added:</i></p> <ul style="list-style-type: none"> ● New Section: Process for Addressing Incidents of Inappropriate AI Usage
<p><u>Section:</u> Instructional Funds & Content & Community Providers</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> ● Updated ordering deadlines
<p><u>Section:</u> High School</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> ● Adding/Changing/Dropping Courses dates updated ●

<p><u>Section:</u> High School > Junior High Students Taking High School Courses</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none">● Updated junior high required courses for students taking Algebra 1 or higher; removed world language.● Clarified the graduation credit the junior high students could receive, but not fulfill a graduation requirement in math.
<p><u>Section:</u> Title I & Title III</p>	<p><i>Added:</i></p> <ul style="list-style-type: none">● Partial credit and course completion allowances given to homeless and foster youth



Special Education Handbook - 2024-2025

Thank you for choosing Excel Academy Charter School (“EACS”) to support you on your student’s educational journey. We recognize the unique challenges that you may encounter while supporting your student with special needs in an independent study learning model and want to ensure that you have a reference guide to provide important information about the Special Education department at Excel Academy Charter School.

Excel Academy’s special education department is staffed with a collaborative team of credentialed special education teachers, specialists, and administrators who each bring a wealth of experience serving and supporting students with special needs to our school. We look forward to working with your student(s) to provide their Individualized Education Plan (“IEP”) supports and services in our personalized learning environment.

If your student is newly enrolled, we are pleased to welcome you to the Excel Academy family! If your student is continuing with us, we hope you will find this handbook helpful as a reference guide for a variety of topics and frequently asked questions.

I am honored to have the privilege of supporting this team as we embark on another year.

Sincerely,

A handwritten signature in blue ink that reads 'Lara Ulmer'. The signature is written in a cursive, flowing style.

Lara Ulmer
Director of Special Education

To view the general Excel Academy Charter School handbook on our website, please [click here](#).

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Special Education Department Contacts

Parent Support

Parent support is available during school hours, Monday through Friday from 8:00 A.M.–4:30 P.M. Please see the information below for special education department contact information.

Mailing Address

Our office is located at:

1 Technology Drive, Ste I-811
Irvine, CA 92618

For all questions, please **first** contact your student's **assigned Case Manager (“CM”)** for support. You will receive contact information for your student's CM prior to the first day of school. If you wish to reach a different staff member by email, please use one of the contacts below.

Student Records Requests:

Loubna Shokair, Registrar - registrar@excelacademy.education

Newly Enrolled/Transfer Students:

Lara Ulmer, Director of Special Education - lulmer@excelacademy.education

Case Manager and IEP Service Provider Questions:

LaKeyshia Ono, Special Education Program Coordinator - lono@excelacademy.education

IEP Questions or Concerns:

Leah Vides, Special Education Program Specialist - lvides@excelacademy.education

General Special Education Referral Questions:

Noell Scott, School Psychologist - nscott@excelacademy.education

Speech and Language Therapy Referral Questions:

Lisa Villarreal, Speech and Language Pathologist - lvillarreal@excelacademy.education

If you wish to reach a specific team member by phone, please use one of the following:

Excel Academy Main Office	PH: 949-387-7822
Records/Registrar - Loubna Shokair	PH: 714-387-9677
Special Education Coordinator - LaKeyshia Ono	PH: 424-322-0799
Program Specialist - Leah Vides	PH: 626-863-8950
Director of Special Education - Lara Ulmer	PH: 949-378-1350

Please refer to the general EACS Handbook for additional staff contact information

Contact Information and Communication Policy

School Communication Responsibilities

It is imperative that we are able to communicate effectively with our families due to the remote nature of our school. The school requires that all parents reply to communication from Excel Academy staff and Teachers of Records within 48 hours (2 business days). We also require 24 hours notice in the event a parent must cancel an Excel Academy appointment, including but not limited to: LP meetings, IEPs, SPED provider appointments, and Student Success Team (SST) meetings.



Communications with the Special Education Team

The main venues of communication and document submission to parents of special education students are Email and DocuSign. Parents will receive time-sensitive communication, information about upcoming events, reminders, surveys, and IEP-related documents via both of these methods.

DocuSign is a secure means for the electronic delivery of documents and the gathering of formal signatures. It is not required that you have a personal DocuSign account in order to access, view, and provide signatures on documents sent to you. In addition, you may request that a physical copy of any document be forwarded via US Mail or email attachment. Whenever you receive a confidential document via DocuSign, the passcode will be your student's SIX digit

birthday in MMDDYY format. For example, if your student's birthday is 3/2/13, the passcode will be 030212. ***Please let your student's Case Manager know as soon as possible if you would like to update your email contact information.***



Enrollment

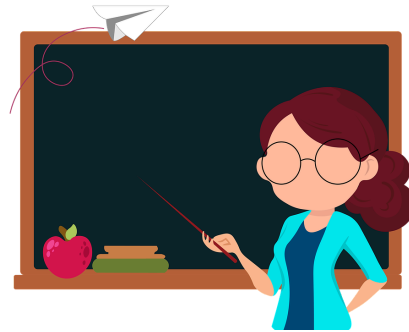
Students newly enrolled in Excel Academy Charter School (“EACS”) with an active IEP will be supported during each step of the transition. Once the admissions process is complete, your student will be assigned to a Teacher of Record (“ToR”), who will walk you through the details of the Master Agreement (“MA”) as well as the Acknowledgement of Responsibilities (“AoR”). The MA is a binding agreement between Excel Academy, the student, the parent/guardian, the supervising ToR, and other responsible persons. The agreement documents assigned courses as well as the time, manner, and frequency of the student’s meetings with the faculty. The AoR further outlines terms and conditions of Independent Study responsibilities.



Once both the MA and the AoR have been signed, your student is considered fully enrolled in EACS. Our special education team will support the process of requesting, gathering, and reviewing your student’s records prior to sending a welcome letter via email describing next steps. Once you have received your student’s welcome letter, please contact LaKeyshia Ono, Special Education Program Coordinator if you have any questions.

The Excel Academy IEP Team

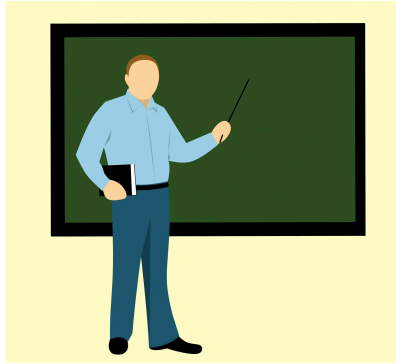
Teacher of Record (ToR) - The ToR is a single or multiple subject credential-holding teacher who works with assigned families to identify, support, and implement a personalized learning plan for each student. The assigned ToR will serve as the General Education teacher in all IEP meetings.



Parent/Guardian - Parents and guardians are considered vital participants in any IEP team discussion. In addition, at Excel Academy, our personalized independent study model requires that a parent/guardian or adult designee be responsible for providing daily core instructional support to students in the home setting.

Student - EACS encourages students to participate in discussion with their IEP team at all meetings, as soon as it is legally and/or developmentally appropriate for them to do so. Student's ages 16 and up will be invited to participate by their CM as an Individual Transition Plan (ITP) becomes a legally mandated portion of the IEP at age 16. Students 18 and up are required to participate, unless EACS has documentation to show continuing parent rights past the age of majority.





Case Manager (CM) - The CM is a fully credentialed special education teacher/education specialist. Your student's CM will provide oversight of all IEP implementation and progress monitoring needs, and in most cases will serve as the direct provider of Specialized Academic Instruction ("SAI") service.

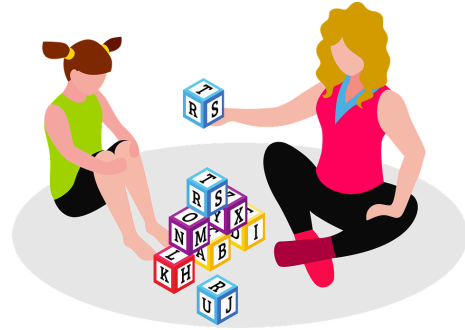
Speech and Language Pathologist (SLP) -

The SLP is an educational specialist trained in the prevention, assessment and treatment of speech and language disorders. If your student is identified as a special education student with only speech needs, an SLP will serve as your student's CM. For students with more complex needs including speech, the SLP will serve as a related service provider.



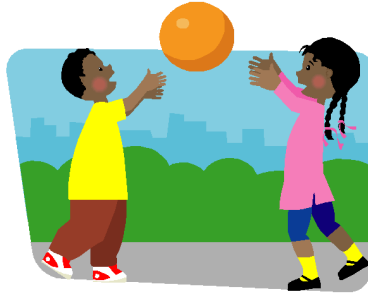
School Psychologist - The School Psychologist is an educational specialist trained in both the psychological and educational disciplines. At EACS, our School Psychologists support the IEP team in completing comprehensive evaluations of students across the domains of general development, cognition, processing, motor skills, academic achievement, adaptive/self-help skills, social-emotional skills. Additionally, they may provide ongoing direct services per the IEP. If your student is due for a comprehensive special education evaluation, or is receiving direct services for social/emotional needs, a School Psychologist will be part of your student's IEP team.

Related Service Providers - Related service providers support the provision of a variety of additional support services that may be provided per your student’s IEP. They are referred to as “related services” because they are intended to address needs related to a primary educational disability condition. Some of the more common related service areas are Occupational Therapy (“OT”), Adapted Physical Education (“APE”), Physical Therapy (“PT”). If your student receives consultation or direct service in any of these areas per their current IEP, or is suspected of having a need for related services, a specialist will be contracted to provide assessment, consultation and/or direct service.



Administrative Designee/LEA Rep -

An administrative designee is required to participate in all IEP meetings. The primary purpose of the LEA Rep is to support the IEP team in collaborative discussion. Additionally, they are tasked with ensuring that our IEP team meeting processes remain both student-centered and legally compliant.



IEP Services

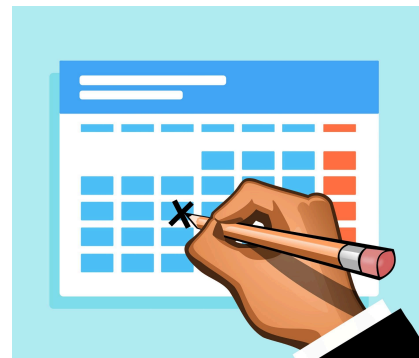
IEP Team Assignments

Prior to the first day of the regular school year, you will receive a personalized contact from your student's assigned Case Manager and all related service providers to discuss a schedule of service provision. Your student's IEP team will be selected and matched to your student(s) based on a variety of factors, including but not limited to credential/license type and geographic location. We have worked to expand our in-house faculty and currently employ a full team of Case Managers, Speech and Language Pathologists, SLP Assistant, School Psychologists, an Occupational Therapist and support staff to meet your student's needs.

Due to the complex nature of matching IEP teams to hundreds of students across several counties, the EACS team is not able to consider requests for specific CMs, providers, or related service agencies.

Scheduling IEP Services

When contacted by your student's service providers you will discuss available appointment times that allow for implementation of your student's IEP according to the frequency, duration, and delivery method required. Please note that services may only be provided during regular school hours (8:00 am through 4:30 pm).



Virtual Services:

All virtually delivered IEP services (individual or group) will be provided via Zoom or a similar online platform. Your CM, SLP, or related provider will provide specific information for platform access.

Virtual Session Participation:

Although the independent study setting offers scheduling flexibility for students to participate in many outside activities, it is important to remember that IEP services are deemed necessary in order for your student to receive educational benefit. With this in mind, when students are participating in any virtual special education service, the expectation is that they will be at home or in a quiet seated work area where they can remain fully engaged with the instructor for the duration of the session. It is not appropriate for students to join virtual sessions while laying in bed or in any location where they are not able to respond to the instructor when asked through a variety of formats (e.g. on-screen chat, written responses).

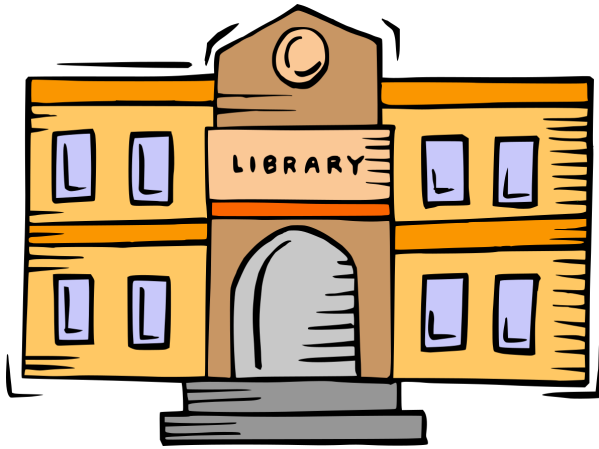
Please consider your student's schedule of virtual services before making commitments to activities that may pose a scheduling conflict or cause your student to be away from an appropriate academic work area when their sessions begin. In addition, EACS requires that students' web cameras are on and that the student is visible in the camera frame during the entirety of each virtual session. If you have any concerns with this, please contact your student's case manager to discuss.

Some of our students may require extra support from a parent during individual virtual sessions to help them adjust to the format. If the parent and CM agree that this is the case, the CM and parent must develop a fade out plan to increase the student's ability to independently participate in sessions.

Due to the confidentiality requirements of special education, parents are prohibited from joining a group session without first identifying themselves. We kindly ask that parents refrain from participating, in any way, in a group session without prior permission from the CM or group instructor. Please note that services may only be provided during regular school hours (8:00 am through 4:30 pm).

In Person Services:

All in-person services will be provided in a public location deemed to be an appropriate environment for the purpose of providing the indicated service. Due to our independent study charter school guidelines, we are not permitted to meet your student for any activity in our physical office location. Please note that services may only be provided during regular school hours (8:00 am through 4:30 pm).



Public Meeting Locations

If your student's IEP calls for in-person service delivery, the service provider will identify appropriate locations to meet with your student within a 25 mile radius of your home address. The provider will contact you to discuss options and agree on a location prior to the first day of service.

Preferred locations for in-person services are public libraries and community centers, although public food establishments and public parks will also be considered. If your student is working with a vendored provider for OT, PT, APE, or another service; you may be required to travel to a clinic/office location to meet your provider.

In Person Participation Guidelines

When students meet EACS providers for in-person sessions, a parent or guardian is required to remain on the premises or within a five minute travel radius of the location. If you choose to leave the premises during your student's session, you must provide your cell phone number to the service provider. If your student experiences a health-related or behavior-related emergency during sessions, it is vital that you are close enough to return to the session location without delay. If an EACS staff member is not able to reach you in the event of a health-related emergency, they will be required to dial 911 for assistance. If your student has a documented medical condition potentially requiring the administration of emergency medications (e.g. Albuterol, Diastat, etc), a parent or caregiver designated by the parent must remain in the immediate proximity of the student for the duration of the in-person session to provide support if needed. Excel Academy employees and contracted support staff are not permitted to provide emergency medications to students .

Prioritizing IEP Services

We understand that in today's world our students have very busy schedules. We also understand that the EACS format allows for them to fill their day with all manner of enriching activities to supplement their formal educational journey. However, we ask that when committing to educational and extracurricular activities you consider the importance of your student's IEP services. Because each IEP service provider is tasked with setting up session schedules to accommodate both individual and group services for students, we ask that you maintain

scheduling flexibility with your student's IEP providers as you work together to determine a mutually agreeable session schedule.

If you are unable to agree to a mutually agreeable schedule and/or location for the delivery of individual special education services, such that your student's IEP is unable to be implemented, EACS will be required to select and notify you of your student's scheduled service time and location. If you choose not to make your student available during the designated service time, please be aware that they will not be entitled to make-up services and EACS may be required to issue a Progress Improvement Notification due to lack of participation/attendance.

All IEP services delivered in a group setting will be pre-scheduled by EACS and are not able to be modified.

If there is a delay on the part of EACS in assigning your student's IEP service providers, make-up sessions will be provided per the IEP for the duration of time that services were unavailable.

Cancellations/Reschedules/No-Shows



We understand that sometimes unforeseen circumstances present themselves. If you need to cancel your student's IEP service appointment due to a conflicting educational or personal activity scheduled during the same period of time, we ask that you please do so at least 24 hours prior to the scheduled appointment. If you need to cancel your student's IEP service due to illness, please notify the provider as soon as you are aware that your student will not be well enough to participate. Parent or student canceled sessions and no-shows will be considered an absence and will not be made-up. Requests to reschedule sessions cannot be accommodated due to staff bandwidth and capacity. If a student demonstrates a pattern of cancellations or no-shows for services, your CM will reach out to determine a plan for increased successful attendance. If the absences continue, you will be contacted by the EACS special education program specialist to discuss. If neither attempt results in improved attendance, Progress Improvement Notifications ("PINs") may be issued per the [EACS SPED Student PIN Policy](#).



CM/ToR Collaboration

Learning Period (LP) Meetings

Learning Period (LP) meetings are a critical part of personalized learning at Excel Academy. The LP meeting takes place at a mutually agreed upon public location, approximately every 20 school days. During the meeting, the ToR communicates with the student one on one to gather information and knowledge learned throughout the LP. If your student is participating in the Virtual Elementary path, their ToR will maintain ongoing documentation of core content presentation in place of the LP meeting requirement.

While it is not required, we encourage you to please share work samples with your student's CM monthly as well. If work samples are not provided regularly throughout the year, your student's CM will request recent samples from your student's ToR, along with general information regarding their observations of academic progress, prior to any scheduled IEP meeting.



Body of Work

A body of work is 20 days worth of learning, in each assigned subject area, generated from the ToR-provided Pacing Guide for each core subject/course. All work should be graded or evaluated in some manner. At each LP meeting, the ToR will collect a sampling from the body of work in each subject/course that is an accurate representation of the work completed. The ToR will file these samples as proof of student daily engagement, attendance and progress.

When scheduling LP meetings with the ToR, please keep in mind your student's Excel provided services. Missed service sessions due to LP meetings will not be made up.

Please note that your student's IEP service providers are required to provide specially designed instruction in accordance with their current documented IEP goals and objectives. Because of this, they are not able to support student completion of work samples for the sole purpose of meeting LP body of work requirements.

Student Pacing and Curriculum

The ToR will provide a pacing guide for all curriculum content in a student's Course of Study before each LP begins. The student's assigned ToR will review the body of work completed by the student throughout the LP and engage in academic conversation to confirm content mastery. Progression through the assigned curriculum content will be verified by the ToR on a weekly basis. If students fail to complete at least 70% of the pacing guide provided by the ToR, they may be issued a PIN.

The ToR, CM, and Special Education Coordinator will collaborate on pacing for students receiving support via an IEP, as needed and requested by the ToR and/or parent. In addition, if a student requires exposure to both a core grade-level curriculum and a supplemental curriculum in order to address their unique needs, consultation will be provided to support appropriate selection, pacing and assessment of progress. If a student is entirely unable to access core grade-level curriculum due to their disability, the IEP team will meet to discuss and determine an appropriate instructional level, and will discuss the long-term considerations of moving a student to an exclusively alternate curriculum.

Special Education Attendance

Consistent attendance for all IEP services is essential to ensuring that each student makes adequate progress and is receiving appropriate ongoing support for their disability-related educational needs. If your family is experiencing a special circumstance that will prevent your student from attending their IEP services consistently, you are encouraged to notify your student's CM as soon as possible. When a student accumulates three cancellations or no-shows for services, your CM will reach out to determine a plan for increased successful attendance. If the absences continue, you will be contacted by the EACS special



education program specialist to discuss the concern. If neither attempt results in improved student attendance, Progress Improvement Notifications (“PINs”) will be issued per the [EACS SPED Student PIN Policy](#).

General Education Attendance

Along with the assessment of student work, another responsibility of the ToR is to verify and claim attendance monthly. Daily engagement will be assessed each school day. Attendance will be claimed on or after the last day of the Learning Period. After reviewing daily engagement and the student’s work, the ToR will verify that ample work was completed by the student from the provided pacing guide for the LP, and the ToR and parent/guardian will sign and date the electronic Attendance Grid Log. *Please note that attendance for IEP services is documented and monitored separately, and does not replace LP attendance requirements. Attendance for students participating in the Virtual Elementary Path will be supported by the ToR.*



Special Education Assessment

Special Education is defined by law as “specially designed instruction, at no cost to the parents, to meet the unique needs of the child with a disability.” In order to determine a student's unique needs and discuss their eligibility for special education, assessment in the areas of suspected disability are required. Once all assessments are complete, the IEP team meets to discuss results, review student progress, and answer the following questions.

1. Does the student meet the State of California’s definition for eligibility criteria as an individual with a disability?

2. Does the severity of the disability have an adverse effect on the student's educational performance?
3. Does the student require special education services to ensure a free appropriate public education?

There are times when an assessment is required, and times when it will be recommended.

Required Assessment Decision Points:

1. Initial referral for special education.
2. Once every three years following the initial (AKA Reevaluation).
3. Anytime a new or additional disability is suspected by any member of the IEP team.

Recommended Assessment Decision Points:

1. Significant change in progress, disability status, or age since last evaluation.
2. Recommended exit from special education service.
3. Lack of consensus among the IEP team regarding the student's disability condition, unique needs, or offer of FAPE.

If your student is due for a required assessment, you will be provided with an Assessment Plan (AP) at least 60 days prior to the date on which the IEP team will be required to convene and discuss results.

If your student is recommended for an additional assessment, an early Reevaluation, or a special education assessment for any other reason, an AP will be provided within 15 calendar days of the referral concern being raised.

Once your consent to the AP is received, you will be contacted by the assigned assessment team to begin scheduling assessment contacts. We kindly request your cooperation and flexibility in accommodating the assessment team as your student may encounter multiple assessors and testing sessions. Following completion of the assessments, an IEP team meeting will be scheduled to review results and discuss recommendations. If you do not choose to provide consent to a required or recommended assessment, a representative from the EACS special education administrative team will contact you to discuss your concerns.

Observation of Student Educational Activities

EACS staff may observe any enrolled student while engaged in educational activities, with or without prior notice. While this is permitted to occur for any reason deemed appropriate and necessary by EACS administration, the primary functions of observation are to ensure that EACS is providing adequate support to students learning in our Independent Study Charter

School environment, as well as to provide support and evaluative feedback to staff. Observations may occur during any Excel sponsored, funded, or supervised activity including but not limited to virtual meetings, online courses, in-person meetings, enrichment activities, extracurricular activities, and field trips.

Special education staff may observe your student participating in their educational day for the purposes of consultative/instructional support to colleagues, staff evaluation purposes, and to provide oversight to the special education team in the delivery and implementation of the special education program. When observations are required to be completed by internal staff to ensure compliance with state and/or licensing board requirements regarding oversight of service providers, student sessions may be canceled in advance to allow for these observations to occur as required.

If the purpose is to complete a structured or unstructured student observation as a portion of formal multidisciplinary evaluation, you will have provided prior permission via an active Assessment Plan (AP).



Individualized Education Plan (“IEP”) Information

IEP Overview

The term “individualized education program” (IEP) refers to a written document, developed for each child with a disability, to include:

1. Student’s present levels of academic achievement and functional performance, including how the disability affects involvement and progress in the general education curriculum.
2. A statement of measurable annual goals, including academic and functional goals designed to enable the student to make progress in the general education curriculum; and to meet other educational needs that result from the disability.
3. A description of how the student’s progress toward meeting the annual goals will be measured, and when.

4. A statement of the special education, related services, and supplementary aids and services that will be provided to appropriately support the student in making progress toward the annual goals.
5. An explanation of the extent, if any, to which the child will not participate with typically developing peers in the regular class and extracurricular and nonacademic activities.
6. A statement of any individual appropriate accommodations that are necessary to support access and formally measure academic achievement and functional performance.

IEP Meeting Scheduling and Participation

The following team members are required to participate in all IEP meetings:

- Parent/Guardian or Designee
- Teacher of Record
- Case Manager
- LEA Rep

*Additional IEP team members may be invited, depending on the purpose and agenda of the scheduled meeting.



Parents/guardians will be contacted at minimum 10 days prior to any proposed IEP meeting date to discuss availability. If no response is received, a written meeting invitation will be provided to reflect the proposed meeting date and time. If you would like to designate another family member or friend to represent you as the parent/guardian at your student's IEP meetings, please submit your request in writing to your student's CM.

If EACS does not receive a response from a parent/guardian when proposing a required IEP meeting, three attempts will be made to engage parents/guardians in the scheduling process. If those attempts are unsuccessful and no response is received, an IEP date will be determined based on the availability of the remaining team members, and the IEP will be held without parent/guardian participation.

All EACS IEP meetings are held via the online platform Zoom, which provides both telephonic and videoconference access. Prior to the meeting all participants will be provided with a unique, secure access link.

IEP Plan Review Meetings

Each student's IEP is required to be reviewed at least once annually. The primary purpose is to discuss progress toward achievement of annual goals, and to update and revise the IEP

appropriately. In addition, the IEP team will meet whenever the parent or another IEP team member requests a meeting to discuss, review or revise the IEP. An IEP meeting will be held within 30 calendar days of receipt of a written or verbal request from a parent.

Changes, Corrections and Amendments

If making changes to a child's IEP after the Plan Review IEP Team meeting for a school year has already occurred, the parent and LEA rep may agree not to convene a full IEP team meeting and instead may develop an amendment to correct or modify the student's existing IEP without a formal team discussion. While this is legally permitted with parent consent, it is recommended that it only be used for minor corrections and changes. The majority of concerns will necessitate the participation of all required IEP team members.

IEP Meeting Guests

Parents/guardians are permitted to invite anyone of their choosing to participate in their student's IEP. However, we at EACS kindly request that you notify your student's CM of any additional attendees prior to the IEP date. If EACS does not receive prior notification of an additional guest, the meeting will proceed so long as the guest participates in discussion in a collaborative and respectful manner, as described below in *IEP Participation Norms and the EACS Civility Policy*.

If the guest is not able or willing to participate appropriately and the parent/guardian insists on their participation, the LEA representative may choose to end the meeting and reschedule for a time when additional administrative support can be provided.

IEP Meeting Participation Norms



1. Allow each other to talk without interruption. If needed, write questions or comments down and present them when the person is finished speaking.



2. Treat each other with respect. Voice levels will be kept down, profanity will not be used, narration will be kept to a minimum and everyone will remain engaged until the meeting is over. Generalized statements such as "You never..." "He always..." "No one cares about..." etc. will be avoided.



3. Summarize assessment results in 15 minutes or less.



4. Listen to understand each other's viewpoint. Frame responses as a question and do not assume you know the answer. You may not agree with the person speaking and that is your right. Everyone is entitled to their personal view.



5. Focus on the future whenever possible rather than returning to past difficulties.



6. Anyone may call a private meeting (caucus); just ask for one.



7. The meeting is confidential.

8. Agree to time constraints.

Additionally, please be aware all activities occurring while in contact with Excel Academy staff are bound by the EACS Civility Policy. In the event that any party is uncivil during a school-related activity, the following steps will occur:

1. Communicate - The party experiencing the uncivil behavior will communicate that the behavior is not civil and uncivil behavior must cease immediately.
2. End Activity/Meeting - If the uncivil party fails to correct the uncivil behavior as directed, the affected party shall end the activity/meeting.
3. Referral - The reporting party shall refer the situation to the school administration with a written summary of the uncivil behavior and how he/she responded.
4. Determination - If it is determined that uncivil behavior occurred, proper disciplinary action will be taken, which may include suspension or expulsion.

Sample Plan Review IEP Meeting Agenda

1. Introductions, Purpose of Meeting, Establish Time Constraints
2. Procedural Safeguards
3. Student Strengths and Parent Concerns
4. Goal Progress Review
5. Special Factors
6. Proposal of New Goals
7. Accommodations and Modifications
8. Statewide Assessments
9. Services

10. Transportation
11. Extended School Year
12. Placement and LRE
13. Emergency Circumstances Plan
14. Offer of FAPE



Understanding FAPE

The acronym “*FAPE*” stands for Free and Appropriate Public Education. All students enrolled in EACS are enrolled in a public charter school, thereby ensuring access to three portions of this standard - *Free, Public, Education*.

The “A” in FAPE, stands for “Appropriate” and is determined via the IEP process. The FAPE standard mandates that every student identified as eligible for special education receive an education that includes specialized instruction to meet their unique needs. The formal written offer of FAPE is usually the final discussion item in the IEP agenda, and outlines the specific services and supports deemed necessary to provide the student with a FAPE.

IEP Consent

Following each IEP meeting, you will receive a full copy of the final IEP document via DocuSign. *The EACS team asks that you please review and provide a response to your student’s IEP within 15 calendar days.* If you have any questions regarding the content of your student’s IEP document and would like to discuss it further before providing a response, please contact your student’s CM. Each IEP signature page will reflect options to agree in full, or to agree with exceptions. If no response is received within 15 days of the first DocuSign delivery, the EACS special education program specialist will follow up with you to discuss your options for providing consent

It is important to note that without parent consent, we are unable to implement any changes to the IEP, including any changes to your student’s services or accommodations.

Independent Study and Special Education

EACS offers independent study to meet the personalized educational needs and goals of all enrolled students. For students with identified special education needs, the IEP then provides an

additional layer of individualization. It is important to note that Independent Study is an alternative education program designed to teach the knowledge and skills of the core curriculum, and is considered to be a uniquely non-restrictive placement within the special education continuum. Independent study placement cannot be unilaterally determined by a parent or LEA, it must be an IEP team decision.

As part of the required agenda topics for each IEP meeting, the student's team will review progress, discuss ongoing needs, and will determine an offer of FAPE in the LRE. If the needs of the student can continue to be met in the Independent Study setting, it will remain the recommended LRE. However, if the student is determined to require a more restrictive placement in order to make progress, the IEP team is obligated to make an offer of FAPE to include a placement in the LRE that is appropriate for the individual student.



Curriculum and Materials

California State & Grade-Level Standards

Excel Academy students must show progression towards, and mastery of, California State Content Standards in order to remain enrolled. With the help of an assigned ToR, students will be guided towards the completion of these standards. ToRs will monitor and adjust student progress through the curriculum regularly to ensure completion of the grade-level standards .

ToRs will provide a copy of the grade-level content standards for all students enrolled. Additionally, parents can obtain the subject and course standards directly from the [California Department of Education](#) website.

Criteria for Materials That Can Be Purchased with Instructional Funds (IFs)

Excel Academy receives funding from the state to support student learning and progress toward the standards. Therefore, IFs need to be spent on educational items that meet the criteria below.

ToRs will consult with the Student Services Manager 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.

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.

Additional Guidelines for Special Education

Students who are receiving the support of special education are likewise expected to show progression toward grade-level standards, unless the IEP team has agreed that an alternate curriculum is required due to the unique nature or severity of the student's disability condition.

Unless an alternate curriculum determination has been made and documented by the IEP team, all EACS students must first select an appropriate foundational core curriculum to address all standard subject requirements at their enrolled grade level. Once that selection has been made, it is appropriate and permitted to select an additional supplemental curriculum to support scaffolding between the student's instructional level and currently enrolled grade level. If you require support in selecting an appropriate core curriculum at your student's grade level, or a supplemental curriculum, you are encouraged to collaborate with their assigned ToR and CM for recommendations.



Intervention

WIN

The What I Need (WIN) Program provides quality instruction & progress monitoring to a particular group of students who are performing below grade-level standards. Students are placed in the WIN program based on i-Ready data and ToR proctored assessments. Excel believes it is imperative to ensure each student is performing up to their full potential. Additionally, the state of California requires every public school to have a *Multi-Tiered System of Supports (MTSS)* in place to help students reach state standards. (Link provided: <https://www.cde.ca.gov/ci/cr/ri/>)

It is important to note that ALL parts of the WIN program are required per the Acknowledgment of Responsibilities signed with the 2023/2024 Master Agreement. If students or parents do not participate in the WIN Program, they may receive a Progress Improvement Notification (PIN).

It is important to note that EACS students receiving special education are not exempt from WIN requirements. WIN is intended to provide Tier 2 academic support and intervention, and Special Education is intended to provide Tier 3 support via specialized academic instruction (SAI). These two levels of support build on each other; one does not automatically replace the other. However, it is recommended and encouraged that any concerns regarding a special education student's participation in the WIN program be brought to the IEP team for discussion and consideration.



State and Local Assessments

i-Ready Benchmark Assessments

i-Ready benchmark assessments are adaptive diagnostic tests that will indicate mastery and identify learning gaps for students in grades K-11. The benchmark assessments will be administered at least twice annually within the set testing windows. 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. However, any applicable accommodations will be provided per the student's IEP.

Statewide Standardized Testing

All students identified as requiring special education are expected to participate in standardized state and local assessments along with their nondisabled peers. The California Assessment of Student Performance and Progress ("CAASPP") is the state-mandated academic testing program. The California Alternate Assessment ("CAA") is available to students with significant disabilities preventing access to the CAASPP. All charter schools are required to administer the CAASPP and CAA to identified students, as well as other state-mandated assessments.

In California, parents may opt out of state mandated academic testing by submitting a written request to the school each year. *We do not recommend opting out.* Again, please note that this applies only to state mandated assessments and will not excuse your student from participating in EACS' required internal progress monitoring activities such as iReady assessments, described above.

Your student's IEP includes a section wherein any permitted accommodations will be reflected to support your student's access to standardized state testing activities. If your student's IEP reflects highly individualized accommodations requiring one-on-one administration, their participation will be supported by a designated member of the special education team. If you have concerns about your student's ability to access statewide standardized testing, you are encouraged to discuss your concerns with the IEP team.

If your student requires one-on-one testing, you will receive communications from the special education department prior to the testing window regarding the specifics of planning for your student's participation. The testing window typically takes place during the last 6-7 weeks of the school year, in April and May. We strongly encourage you to consider this timing when making plans for out-of-state travel with your student. If your student is required to test in-person due to their IEP accommodations, you will be provided with a minimum of two weeks notice regarding test locations and appointment times. During the statewide testing window, some of your student's regularly scheduled service sessions may be rescheduled and/or canceled to allow for internal special education staff to support student participation.

If you have any general questions about the EACS statewide testing requirement, please refer to pages 77-79 of the EACS 2024-2025 Manual.

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 will result in PINs being issued to the student. Please refer to Excel Academy's [Special Education Student PIN Policy](#) for more information.

Report Cards and IEP Progress Reports

Students in grades TK- 12 will receive report cards to document progress and growth following the end of each semester with Excel Academy. The grades administered on the report card are final as determined by the ToR and the administration.

IEP Progress reports will also be provided biannually, during the same timeframe in which semester-end report cards are completed. Your student will receive a detailed progress report for each individual goal addressed by the last agreed upon IEP.

In addition, your student will receive updated progress reports at each annual IEP review meeting. The data shown on each progress report provided at the semester's end will reflect progress from the point of the last IEP revision to the end of the semester. For the most comprehensive picture of your student's IEP progress over the course of one full IEP implementation year, please refer to the annual progress report provided within the annual IEP review.



High School

Graduation Requirements

Students are eligible to earn a regular high school diploma when all requirements below have been met:

1. English - 40 credits
2. Math - 20 credits
3. Science - 20 credits (1 life/1 physical)
4. History - 30 credits (1 US/ 1 world/gov/econ)
5. VAPA/World Language/CTE - 10 credits

6. PE - 20 credits
7. Ethnic Studies - 5 credits
8. Electives - 75 credits

Total to graduate: 220 credits

*5 credits = 1 semester / 10 credits = 1 year

Certificate of Completion (“COC”) Requirements



Not all students in California public schools are able to meet traditional graduation requirements. California public school students with significant disability conditions have the option to pursue a non-diploma track that will earn an alternative form of certification permitting that will permit participation in graduation and graduation related activities. Students with identified unique needs related to a disability condition are eligible for an alternate High School completion option, per their active Individualized Education Plan (“IEP”).

Given that the aforementioned is based on an IEP team recommendation, the IEP team will meet to discuss high school completion options and determine the appropriate path for any student identified with a significant cognitive disability. This IEP meeting may occur as early as the spring semester of the student’s 8th grade year but will be held no later than the first semester of enrollment in 9th grade coursework. The student’s progress toward COC requirements will then be revisited at each IEP meeting to follow. If it is determined by the IEP team that the appropriate High School completion path is a Certificate of Completion (“COC”), the student will be required to meet the following requirements:

1. Three years/six semesters of English Language Arts.
2. Two years/four semesters of mathematics.
3. Two years/four semesters of science, including one year each of life biological and physical sciences.
4. Two years/four semesters of social studies.
5. Two years/four semesters in physical education, unless the pupil has been exempted pursuant to the provisions of Ed Code Section 51241.
6. Two and a half years/five semesters of Employment, Education, and Life Skills. Five credits (one semester minimum) required in each category.

Total to earned COC: 135 credits

For more information, please refer to the [EACS COC Policy](#).

Individual Transition Plan (“ITP”) and Transition Services

An ITP is required to be developed for each student with special needs, beginning no later than the first IEP expected to be in effect when the student turns 16. This portion of the IEP will contain

1. Appropriate measurable postsecondary goals related to training, education, employment, and where appropriate, independent living skills. These recommended goals will be based upon age appropriate transition assessments.

and

2. Recommended transition services needed to assist the child in reaching postsecondary goals.

Federal law requires schools to provide disabled students with specialized supports from age 3 until age 22, or until they graduate from high school with a regular high school diploma. Students who receive a COC may decide to return to high school and can do so through the age of 22. There are three events that end the school’s responsibility to a student with a disability.

1. Student earns a regular high school diploma.
2. Student turns 22.
3. Student or parent/guardian (in the case of conserved adults) requests revocation of all special education and related services.



Graduation

All special education students who are working toward earning a regular high school diploma will receive a Prior Written Notice (“PWN”) no more than 30 days prior to their anticipated graduation date. The PWN will confirm the forthcoming completion of diploma requirements, and will provide specific information regarding the end of special education services due to graduation. Following graduation, a Summary of Progress (“SOP”) and copies of all recent IEP documentation will be provided to the parent/guardian and/or adult student along with their final IEP progress report.

Student/Parent Requests for Revocation of Special Education

Parents and non-conserved students of majority age have the right to entirely revoke the provision of special education and related services at any time, without reason, following

notification in writing. While we ask that you please put such a request in writing, EACS will accept verbal revocation requests made to any staff member, and will follow-up in writing to confirm informed consent to the revocation.

Parents and non-conserved students of majority age also have the right to revoke specific services. In these cases, an IEP will be scheduled to discuss the ramifications of the request.

Once a student or parent has revoked permission to implement the IEP, the student is immediately considered a general education student. If new concerns arise following a revocation decision, the special education referral process may be initiated again by the student, parent, or any staff member without delay.



Schoolwide Discipline Procedures

Progress Improvement Notification (PIN) and Identified Assignments

In order to remain enrolled at Excel Academy, the responsibilities outlined in the Master Agreement, Independent Study Policy, Attendance Policy, Progress Improvement Notification Policy, and Involuntary Withdrawal Policy must be followed. Within these policies, the process for which a student may be involuntarily withdrawn from Excel Academy is outlined. Part of that process includes the issuance of Progress Improvement Notifications (PINs) when a student fails to complete identified assignments key to a student's success in the independent study environment or any other responsibilities outlined in the EACS Handbook, Acknowledgement of Responsibilities, and Master Agreement.

PIN Process for Students with IEPs

EACS is required to provide a FAPE to all students with an IEP. The purpose of the Sped PIN policy is to outline the steps that will be taken if all responsibilities are not fulfilled per the student's active IEP and the EACS AoR.

Link to full [SPED PIN Policy](#)



Governing Board Policies

In addition to attendance, the parent and student must abide by all board approved policies. These policies include, but are not limited to:

- The Academic Integrity Policy
- The Civility Policy
- The Acceptable Use Policy

The complete list of all Board-approved policies as well as how to access them may be found at <https://excelacademy.education/our-board/board-policies>

Translation in primary language can be provided upon request.

Procedural Safeguards

Individuals with disabilities and their parents are afforded rights and procedural safeguards to ensure that all individuals with disabilities are provided a free and appropriate public education (FAPE).

Parents can obtain assistance in understanding their rights and procedural safeguards from the Excel Academy Charter School Special Education Department, the Sonoma County SELPA, or the California Department of Education.

Excel Academy's special education department receives general operational support and guidance from the Sonoma County Charter SELPA (sonomaselpa.org). Please refer to the following links for the most current Notice of Procedural Safeguards. If you require translation in a language other than those presently available on the website below, please contact our office for assistance.

<https://www.sonomaselpa.org/info/notice-of-procedural-safeguards>



Frequently Asked Questions

1. I think my child's sibling may need special education services. Who do I call?

Please contact EACS' School Psychologist, Noell Scott, at nscott@excelacademy.education for additional information.

2. My student has a private specialist they really enjoy working with. How can I request that we work with them for their IEP services?

EACS will not accept requests to develop new relationships with specific special education agencies or providers. The internal special education team currently includes a staff of highly qualified and appropriately credentialed professionals to provide the majority of IEP services. For any specialty areas in which we do not employ internal staff, an appropriate NPA-approved provider will be identified and assigned within your county of residence.

3. What is the process for requesting a new Case Manager or IEP service provider?

Due to the complex nature of matching IEP teams to hundreds of students across several counties, the EACS team is not able to consider requests for specific Case Managers, providers, or related service agencies.

**If you have a concern to report regarding your Case Manager or a related service provider failing to implement your student's IEP, please contact Leah Vides, Program Specialist at lvides@excelacademy.education.*

4. I work full time. How am I expected to keep up with the expectations of this school?

EACS provides support to students and families in successfully accessing and participating in independent study. All EACS students must additionally have the support of a primary educator in the home setting during the school day; usually a parent or guardian. We understand that each of our families have

different personal circumstances, however, the success of your student in our independent study placement depends largely on the ability of a consistent adult to provide core instruction.

5. I recently received a new diagnosis from my student's pediatrician that may affect their learning. Do I need to inform the IEP team?

Anytime you have new information regarding your child that may affect their learning it is important to share with the IEP team. Please contact your Case Manager with this information and an IEP meeting will be called to review any new records and discuss if any changes to the current IEP are necessary.

6. I have private speech, PT and OT services through my insurance. Can I choose to only attend those instead of the IEP services EACS offered to address my student's needs?

EACS is required to ensure the provision of all services to your student, by qualified personnel, in accordance with their current IEP offer of FAPE. We understand that many students additionally receive privately funded services outside of school hours however they cannot replace educationally-based services. If you believe your student no longer requires these services to address their unique educational needs, please contact your student's Case Manager to request an IEP meeting and discuss their progress.

7. I am not willing to transport my student to multiple locations during the week to meet with their IEP service providers. Can I change all their IEP services to virtual delivery?

EACS is a flexible, Independent Study charter school. All special education services are either provided virtually, in-person at a service provider's clinic/agency, or in-person at a mutually agreed location between the student's home and the service provider's location. Service delivery setting (in-person or virtual) is an IEP team decision determined according to the individual student's needs as a result of their disability. Travel distance is not a consideration when determining whether virtual or in-person services are appropriate.

8. Can I request all individual service delivery? My student doesn't do well in groups.

Service delivery is an IEP team decision based on the recommendation of the service provider and team discussion. The IEP team will consider the student's specific needs and IEP goals as a guide when determining the appropriate service delivery group size for each individual student. At times it may be appropriate for a student to receive special education services within a small group setting to support goal progress, while at other times individual services are determined appropriate.

9. How do I request a copy of my student's special education records?

Please contact registrar@excelacademy.education.

10. I have a question about my student's recent IEP. Who do I contact?

Your first point of contact for all questions regarding any portion of your student's IEP, or the implementation of services, is your student's current Case Manager.

Glossary of Terms

AoR: Acknowledgment of Responsibilities

AP: Assessment Plan

APE: Adapted Physical Education

CAA: California Alternate Assessment

CAASPP: California Assessment of Student Performance and Progress

CM: Case Manager

COC: Certificate of Completion

Ed Code: California's comprehensive guideline of laws and regulations for special education

ESY: Extended School Year

FAPE: Free and Appropriate Public Education

IDEA: Individuals with Disabilities Education Act

IEP: Individualized Education Plan

IF: Instructional Funds

ITP: Individual Transition Plan

LEA: Local Education Agency

LP: Learning Period

LRE: Least Restrictive Environment

MA: Master Agreement

OT: Occupational Therapy

PIN: Progress Improvement Notification

PT: Physical Therapy

PWN: Prior Written Notice

SAI: Specialized Academic Instruction

SLP: Speech and Language Pathologist

WIN: "What I Need" - EACS Intervention Program

EACS MAY 2024 - SPED HANDBOOK REVISIONS

Recommended for board approval to align with new provisions and update language for clarity

Section	Item
<p><u>Section:</u> Contact Information and Communication Policy</p> <p><u>Section:</u> The Excel Academy IEP Team</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> ● Added information regarding parents receiving confidential documents through DocuSign <p><i>Revised:</i></p> <ul style="list-style-type: none"> ● Included information for student participants in IEP meetings due to Individual Transition Plan mandates
<p><u>Section:</u> IEP Services</p> <p><u>Section:</u> Special Education Assessment</p>	<p><i>Added:</i></p> <ul style="list-style-type: none"> ● Added information regarding the hours in which IEP services can be scheduled. ● Included procedures regarding students who have documented medical conditions requiring the use of emergency medications <p><i>Revised:</i></p> <ul style="list-style-type: none"> ● Clarified reasons for which a parent may need to cancel their student’s IEP service appointment <p><i>Revised:</i></p> <ul style="list-style-type: none"> ● Changed all cases of “triennial” wording with “reevaluation” <p><i>Added</i></p> <ul style="list-style-type: none"> ● Policies for internal staff observation of student sessions

<p><u>Section:</u> IEP Information</p>	<p><i>Added:</i></p> <ul style="list-style-type: none">● Included “Emergency Circumstances Plan” in the sample plan review IEP meeting agenda
<p><u>Section:</u> High School</p>	<p><i>Added:</i></p> <ul style="list-style-type: none">● Included additional rights for parents and students to revoke Special Education services
<p><u>Section:</u> Procedural Safeguards</p>	<p><i>Revised:</i></p> <ul style="list-style-type: none">● Removed linked copies of safeguards and instead directed parents to the Sonoma Selpa website



Excel Academy Charter School Master Agreement for Independent Study - Personalized Path

Student: Student, John
Student Number:
Address: 123 First Street
Location: Los Angeles, CA 92088 **1st Phone Number:**
DOB: 01/05/2009
Program Placement: General Education

Contract Term: Full Year
Beginning Date: 08/22/2024
End Date: 05/30/2025
Year: 2024-2025
2nd Phone Number:
Grade Level: 10
School for Classroom Option: Los Angeles Unified

It is understood that:

Objectives: The student will complete the courses listed below. All course objectives will be consistent with the established school’s governing board and are consistent with the schools or state standards as outlined in the schools subject/course descriptions. Assignment and Work Record (AWR) Forms will include additional descriptions of the major objectives and activities of the courses of study covered by this agreement including the evaluation of student work and are incorporated herein. The term "Course Value" (CV) refers to the number of credits (secondary education) or weeks of work (elementary education) the student will attempt.

Schedule Category Course Value BT Chemistry w/lab A Physical Science 5 Credits BYU English 10 part 1 English 5 Credits BYU English 10 part 2 English 5 Credits BYU: World History A World History 5 Credits EDG Chemistry w/lab B Physical Science 5 Credits EDG French 2 A World Language/VAPA 5 Credits Geometry A Mathematics 5 Credits Geometry B Mathematics 5 Credits FLV French 2 B World Language/VAPA 5 Credits PE 10 A Physical Education 5 Credits PE 10 A, PE 10 B Physical Education 5 Credits World History B World History 5 Credits Language Arts 36 weeks, Mathematics 36 weeks, Social Studies 36 weeks, Science 36 weeks, Physical Education 36 Weeks

Methods of Study: Specific methods of study will be designated on the Assignment and Work Record (AWR) and are incorporated herein. Examples of methods of study for the student will include: Independent Reading, Textbook Activities, Problem Solving, Study Projects, Drill & Practice, Experiential Learning, Computerized Curriculum, Web/Internet Research, Library Research, Field Trips, and Community Provider Courses.

Specific Resources: The school will provide appropriate instructional materials and personnel necessary to the achievement of progressing through grade level content standards and must include resources that are traditionally available to all public school students. Assignments and specific resources will be designated on the Assignment and Work Record (AWR) and are incorporated herein.

Methods of Evaluation: Academic evaluations will be designated on the Assignment and Work Record (AWR) and are incorporated herein. Other acceptable methods of evaluation include, but are not limited to: Teacher Made Tests, Student Conferences, Progress/Report Cards, Chapter/Unit Tests, Work Samples, Observations, Portfolios, State Standards

Testing, Learning Journals, Presentations, Quizzes, Labs, and Finals.

Personalized Path Students are required to report to their teacher as scheduled: Manner of Reporting: One-on-One, Small Group. Time: 8:30am- 4:30 Day: Mon - Fri. Frequency: at minimum once every 25 school days. Duration: Full Year. Location: Varies. Communication with parents or guardians may come in the form of in-person or virtual meeting, phone call, email, text message, physical letter, and or mailed letters.

Virtual Path Students are required to report to their teacher as scheduled: Manner of Reporting: One-on-One, Small Group, whole group. Time: 8:30am - 4:30 Day: Mon - Fri. Frequency: daily with a combination of synchronous and asynchronous learning opportunities. Attendance will be collected daily and reported at minimum once every 25 school days. Duration: Full Year. Location: Varies. Communication with parents or guardians may come in the form of in-person or virtual meeting, phone call, email, text message, physical letter, and or mailed letters.

Voluntary Statement: It is understood that independent study is an optional educational alternative in which no pupil may be required to participate. In the case of a pupil who is referred or assigned to any school, class, or program pursuant to Education Code Section 48915 or 48917, instruction may be provided for a student through independent study only if the student is offered the alternative of classroom instruction.

Board Policies: According to the Board Policy for grades Tk through 12, the maximum length of time allowed between when the assignment was made and the date the assignment is due is 25 school days, unless an exception is made in accordance with the Board Policy. After 3 missed assignments, as per Board Policy, an evaluation will be made to determine whether independent study is an appropriate strategy for this student.

Additional Board Policy:

Specific Resources including materials and personnel that will be made available to all students.

The school shall provide specific resources including confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work. The school will provide all school personnel, a credentialed teacher, textbooks, computers and software, supplementary material, educational activities, and community resources.

Academic and Other Supports: The school shall utilize its Multi-Tiered Systems of Support (“MTSS”) to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English Learners, foster and homeless youth and pupils requiring mental health support. As a public charter school, EACS follows all rules and regulations contained within the Individuals with Disabilities Education Act (IDEA) and the California Education Code. EACS is committed to providing required services and supports per a pupil’s active Individualized Education Program (“IEP”) where applicable. Policies, procedures, and guidelines are in place to ensure that students are identified, assessed, and provided a free appropriate public education (“FAPE”) in the least restrictive environment (“LRE”). EACS additionally complies with Section 504 of the Federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794) and is committed to providing equivalent access to public education for all students with disabilities. The school shall provide specific resources including confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work.

Missed Assignments and Satisfactory Progress: An evaluation shall be completed to determine whether it is in the best interest of the student to remain in independent study under the following circumstances:

1. In the event that three or more identified assignments are missed in a learning period; and
2. In the event Student’s educational progress falls below satisfactory levels as determined by the Charter School’s *Satisfactory Educational Progress Policy* and procedure which considers ALL of the following indicators:
 - a. The pupil’s achievement and engagement in the independent study program, as indicated by the pupil’s performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in the Education Code Section 52060(d) paragraphs (4) and (5).
 - b. The completion of assignments, assessments, or other indicators that evidence that the pupil is working on

assignments.

- c. Learning required concepts, as determined by the supervising teacher.
- d. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher.

This evaluation will be documented in the attendance record and learning record documents and will be maintained as a mandatory interim student record which shall be maintained for a period of three years from the date of the evaluation and if the pupil transfers to another California public school, the record shall be forwarded to that school.

Parent/Guardian Progress Communication:

The Charter School has adopted tiered reengagement strategies for all pupils who are not generating attendance for more than three school days or 60 percent of the instructional days in a school week, or who are in violation of the written agreement pursuant to Education Code Section 5747(g). These procedures are as follows:

1. Verification of current contact information for each enrolled pupil;
2. Notification to parents or guardians of lack of participation within one school day of the absence or lack of participation;
3. A plan for outreach from the school to determine pupil needs including connection with health and social services as necessary;
4. An Early Intervention/Re-Engagement letter will be sent via email or hard copy to parents, guardians or caregivers who are making unsatisfactory educational progress.
5. A preventative meeting will be scheduled to offer resources, including connection with health and social services as needed.
6. An Attendance Intervention Meeting (AIM) will be held once a student receives a second Progress Improvement Notification (PIN) to determine if it is in the best interest of the student to remain in independent study. The meeting shall include a review of the pupil's written master agreement, and reconsideration of the independent study program's impact on the pupil's achievement and well-being. If the student and parent/guardian elect to stay enrolled, the team will develop an agreement to help support the student to make satisfactory educational progress, including additional resources and supports.
7. If the student continues to make unsatisfactory educational progress, then a third Progress Improvement Notification (PIN) will be given and an internal evaluation will be conducted to determine whether it is in the best interest of the student to remain in independent study. If the evaluation finds that it is not in the student's best interest to remain in independent study, the student may be removed in accordance with the process outlined in Board Policy 6115 on Attendance, Progress Notification (PIN) and Involuntary Withdrawal.

Tiered Reengagement Strategies

The school shall provide specific resources including confirming or providing access to all pupils to the connectivity and devices adequate to participate in the educational program and complete assigned work. The school will provide all school personnel, a credentialed teacher, textbooks, computers and software, supplementary material, educational activities, and community resources. Academic and Other Supports: The school shall utilize its Multi-Tiered Systems of Support (MTSS) to address the needs of pupils who are not performing at grade level, or need support in other areas, such as English learners, foster and homeless youth, and pupils requiring mental health support. As a public charter school, EACS follows all rules and regulations contained within the Individuals with Disabilities Education Act (IDEA) and the California Education Code. EACS is committed to providing required services and supports per a pupil's active Individualized Education Program (IEP) where applicable. Policies, procedures, and guidelines are in place to ensure that students are identified, assessed, and provided a free appropriate public education (FAPE) in the least restrictive environment (LRE). EACS additionally complies with Section 504 of the Federal Rehabilitation Act of 1973 (29 U.S.C. Sec. 794) and is committed to providing equivalent access to public education for all students with disabilities. The school shall provide specific resources including confirming or providing access to all pupils to the connectivity and devices

adequate to participate in the educational program and complete assigned work. Missed Assignments and Satisfactory Progress: An evaluation shall be completed to determine whether it is in the best interests of the student to remain in independent study under the following circumstances: In the event that three or more identified assignments are missed in a learning period; and In the event Student's educational progress falls below satisfactory levels as determined by the Charter School's Satisfactory Educational Progress Policy and procedure which considers ALL of the following indicators: The pupil's achievement and engagement in the independent study program, as indicated by the pupil's performance on applicable pupil-level measures of pupil achievement and pupil engagement set forth in the Education Code Section 52060(d) paragraphs (4) and (5). The completion of assignments, assessments, or other indicators that evidence that the pupil is working on assignments. Learning required concepts, as determined by the supervising teacher. Progressing toward successful completion of the course of study or individual course, as determined by the supervising teacher. This evaluation will be documented in the attendance record and learning record documents and will be maintained as a mandatory interim student record which shall be maintained for a period of three years from the date of the evaluation and, if the pupil transfers to another California public school, the record shall be forwarded to that school

No show Withdrawal: If a student fails to communicate with the school within the first three school days of enrollment a letter will be sent to initiate a no show withdrawal.

Additional Courses: May be added to this agreement as needed by completion of an addendum and is signed and dated by the teacher and the student.

Signatures and Dates: I have read and I understand the terms of this agreement, and agree to all provisions set forth.

Student Signature Date

Parent/Guardian/Caregiver Signature Date Supervising Teacher Signature Date

OtherSignatureDate OtherSignatureDate



Excel Academy Charter School Acknowledgement of Responsibilities

Student: Student, John

Contract Term: Full Year

Student Number:

Beginning Date: 09/01/2022

Address: 123 First Street

End Date: 06/09/2023

Location: Vista, CA 92081

Year: 2023 - 2024

1st Phone Number:

2nd Phone Number:

DOB: 01/01/2001

Grade Level: 11

Program Placement:

General Education School for Classroom Option: Generic Unified

I, the student, agree to:

- The terms as outlined in the Master Agreement.
- Complete coursework as outlined in the Master Agreement and as assigned by the credentialed teacher.
- Participate in a full academic school day, with the following average hours as guidelines: TK-K 4-hours/day, Grades 1st -8th 5-hours/day, Grades 9th-12th 6-hours/day.
- Attend all required meetings as scheduled and on-time.
- When in a virtual setting I agree to have my camera on and show my face.
- Come prepared to each Learning Period (LP) meeting with the body of work assigned by your ToR. The work should be complete and legible, with clear feedback/grades provided
- Stay on pace to complete my assignments each week. Should I need additional support, I will request it from my ToR.
- Students registered in ETL courses or the Virtual Pathway agree to:
 - Arrive promptly and come prepared each school day to submit or complete assignments as directed by the classroom teacher. Submitted work should always be complete and legible.
 - Attend all scheduled classes, conferences and meetings, actively participating and engaging with participants.
- Complete intervention assignments as required (WIN, ELD, etc). Failure to complete intervention assignments for a period of five school days or more may result in a PIN.
- Regularly attend required intervention classes (WIN Live, ELD Live, &/or Essentials courses) as assigned. Failure to attend intervention classes for a period of five school days or more may result in a PIN.
- I understand that failure to complete intervention requirements for a period of five school days or more may result in a PIN.
- Complete all required assessments, including the following: CAASPP (ELA, math, and science), i-Ready Diagnostic Assessments, grade-level paper/pencil benchmark assessments, Physical Fitness Testing (PFT), Initial and Summative ELPAC assessments, Algebra 1 Readiness Assessment (students entering Algebra I only), intervention assessments, and course assessments.

- Conduct virtual forums, including virtual forums. I understand that my participation in school functions is a privilege which may be revoked if my behavior is not acceptable.
- Use school-issued technology for school-related learning and assignments only, treating it with care and respect.
- If my behavior does not comply with school expectations I may receive a Behavior Improvement Plan (BIP). Three or more unexcused absences will result in a Progress Improvement Notification (PIN).

** Failure to complete mandated school-wide assessments may result in Progress Improvement Notifications (PINS) being issued. Please see the Parent Handbook for a description of the Progress Improvement Notification (PIN) process.*

I, the parent/guardian agree to:

- Prompt, timely, and effective communication with staff within 48 hours, excluding weekends and school holidays.
- Provide necessary documentation or information to the school in order to record attendance in compliance with applicable law.
- Provide the school with all required documentation for continued enrollment, such as proof of residency.
- Provide Excel Academy with in-progress grades if my student enrolls 25 days or more after the start of the semester and understand that in-progress grades will be combined with grades earned at the previous school to award the final semester grade.
Request support from my student's assigned ToR or teacher when needed.
- Provide Excel Academy with a copy of either an unofficial or official transcript.
- Provide transportation to my student's scheduled meetings and school assessments.
- Monitor my student's behavior in all school-related classes or activities.
- Ensure my student complete mandated school-wide assessments such as: CAASPP (ELA, math, and science), i-Ready Diagnostic Assessments, grade-level paper/pencil benchmark assessments, PFT, Initial and Summative ELPAC assessments, Algebra 1 Readiness Assessment (students entering Algebra I only), intervention assessments, and course assessments.
- Support my student in the completion of intervention assignments as required (WIN, ELD, etc). Failure to complete intervention assignments for a period of five school days or more may result in a PIN.
- Ensure regular student attendance in required intervention classes (WIN Live, ELD Live, &/or Essentials courses) as assigned. Failure to attend intervention classes for a period of five school days or more may result in a PIN.
- Conduct myself in a respectful, responsible, and safe manner at all Excel Academy functions. I understand that my participation in school functions is a privilege which may be revoked if my behavior is not acceptable.
- Use instructional funds for approved requests for VCI courses/classes for participation only on instructional days during the current school year.
- Return all school-issued materials upon disenrollment, involuntary withdrawal, or the designated due date. All school purchased materials will be returned to Excel Academy. All materials are the property of Excel Academy and are on loan to the student while enrolled.

Personalized Path:

- Be responsible for the daily teaching, monitoring, verification, and assessment of all

- Be responsible for the adequate academic progress of my student as determined by the ToR. If a tutor is needed, the tutor's instruction does not supersede my responsibility for the day-to-day instruction and progress monitoring of my student.
- Attend Learning Period (LP) meetings at a mutually agreed upon location. If a make-up meeting is scheduled by the parent/guardian, it needs to take place within 5 school days of the original meeting. If this does not occur, a PIN may be issued. Parents/guardians that reschedule more than twice per calendar year may be subject to a Progress Improvement Notification (PIN).
- Provide the body of work for each subject/course assigned according to the pacing guide and all necessary paperwork.
- Ensure the student's coursework aligns with grade-level standards, If the ToR finds that the student's course of study is missing key content standards and provides additional assignments/curriculum, the parent is responsible to ensure that content is covered.
- Upon request, provide work samples every 5 school days to designated staff.
- High school students or students taking high school-level coursework must actively attempt and complete a minimum of at least 25-30 credits per semester in order to maintain earning sufficient credits toward graduation (20-25 credits at Excel Academy if the student is participating in concurrent enrollment).
- Junior high students must receive prior approval to enroll in a high school math and/or world language course for high school credit. Credits do not count toward the required credits for graduation.

Virtual Path or ETL Classes

- Provide the needed support for my student to access online learning and actively participate in class. (Ensure students can login to class and curriculum platforms, as well as access needed classroom materials and checklists.)
- Ensure my student has the camera on and their face is in view.
- Ensure my student completes and uploads all assigned work by the due date set by the classroom teacher.
- Any communication in the chat will be on topic, follow school policies, and be appropriate for the school setting.
- Read all school emails, responding to my student's teacher promptly.
- Oversee my student during school hours, ensuring my student is actively engaged during class time and completing all necessary assignments each school day.
- Provide a quiet atmosphere free from distractions such as televisions, cell phones, and gaming devices. Redirect student attention to the class when necessary.

Attend all required school meetings with the student, on time and as scheduled. If any school meeting is held virtually, I agree to show my face and my student's face on camera during the meeting.

- Notifying school personnel at least 24 hours prior if cancellation or change is necessary.
- Failure to do so for a period of 5 school days or more, will result in a Progress Improvement Notification (PIN).

The charter school has an obligation to provide a Free Appropriate Public Education (FAPE) to every student with an Individualized Education Program (IEP). If my student has an IEP and does not access the special education and related services as outlined in the IEP, the charter school will contact me to discuss

the matter [Excel Academy \(CA\) - Regular Meeting of the Board of Directors - Agenda - Thursday May 9, 2024 at 12:00 PM](#) the reasons for missed or canceled sessions as they relate to the student's unique needs. Parent participation is expected to address the student's access to necessary support and services.

** Teacher of Record responsibilities are outlined in the Student/Parent Handbook*

We, the undersigned, read, understand, and agree to comply with all agreements and policies located in the EACS Handbook.

We, the undersigned, read, understand, and voluntarily agree to the terms and conditions of this Independent Study Acknowledgement of Responsibilities Agreement. Our signatures below indicate that we understand and accept our responsibilities in relation to this document.

_____ Date _____

Student Signature

_____ Date _____

Parent/Guardian/Caregiver Signature

_____ Date _____

Teacher of Record Signature



Excel Academy Charter Schools

2024 - 2025 Academic Calendar

Sem 1 = 89 Days

Sem 2 = 86 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	8/22-9/13	16
2	9/16-10/11	20
3	10/14-11/8	20
4	11/12-12/6	14
5	12/9-1/17	19
6	1/21-2/21	22
7	2/24-3/21	20
8	3/24-4/25	20
9	4/28-5/30	24
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						
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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. 2	- Labor Day
Nov. 11	- Veteran's Day
Nov. 25 - Nov. 29	
Thanksgiving Break	
Dec. 22 - January 3	
Winter Break	
Jan. 20	- MLK
Feb. 14-17	Presidents Day
Apr. 7-11	Spring Break
May 26	Memorial Day
Outside of Instructional calendar	
Holidays 7/4, 6/19	

January						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
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19	20	21	22	23	24	25
26	27	28	29	30	31	

February						
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						1
2	3	4	5	6	7	8
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March						
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16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

April						
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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					

ToR August workdays - 8/13-8/21

Staff August and February 8/12, 2/10

ToR June workdays - 6/2-6/4

Graduation
Non student work days
school holidays
end of semester
P1 / P2 attendance
All Staff in person
ESY - TBD
Graduation 5/28



QUOTE

This is not an invoice

Company Name	Florida Virtual School	Created Date	4/25/2024
Company Address	5422 Carrier Drive, Suite 201 Orlando, Florida 32819 United States	Expiration Date	6/28/2024
Remit To	Florida Virtual School P.O. Box 737413 Dallas, TX 75373-7413	Quote Number	00013013
Prepared By	Shannon Murphy	Account Name	Excel Academy (CA)
Phone	(407) 212-1866		
Email	mmurphy@flexpointeducation.com		

Product	Quantity	Sales Price	Total Price
FlexPoint Hosted Per Student License	100.00	\$192.95	\$19,295.00
FlexPoint Hosted State Content - California	1.00	\$0.00	\$0.00

Grand Total \$19,295.00

Please make PO out to Florida Virtual School and send to info@flexpointeducation.com.

*This is a price quotation for customer's convenience only and not an offer to contract. All quotations are subject to review and final acceptance by a duly authorized representative of Florida Virtual School ("FLVS") at its offices. Not responsible for typographical or other errors. FLVS's standard terms and conditions will apply to any order.

Any pricing in this quotation is exclusive of any applicable sales, use or other similar taxes or duties. The customer is responsible for any such taxes or duties.

Payment Information

Please make PO out to Florida Virtual School and send to info@flexpointeducation.com. If paying via another method, please contact your sales representative for an invoice.

FlexPoint Hosted Per Student Terms

Type of License:

• **FlexPoint Hosted Per Student:** Under the FlexPoint Hosted Per Student License, a student is defined as a unique user ID enrolled in an active status in one or more course for 14 days or that has completed at least 15% of a course, whichever occurs first. If a student is no longer actively enrolled in FlexPoint courses before the renewable term expires, this license cannot be re-used to provide access to another student.

Terms and Restrictions:

- Course materials are NOT included. Please see your FlexPoint representative for a list of applicable materials.
- License includes use of the Buzz Learning Management System (LMS) to teach FlexPoint content.
- Instruction provided by customer.
- eTeacher's Guides are included. (*Guides may not be available for all courses)
- Customer may supplement or hide lessons but may not edit lesson content.
- Some courses may not be available in this model. Please see your FlexPoint representative for details.
- **Overages ("Additional Usage"):** Customer is financially responsible for overages. An overage is any student enrolled in excess of the number purchased at the beginning of or during the term of the license. System-based caps are not available. FlexPoint will audit customer's account for overages and invoice customer for Additional Usage.
- **Digital Library:** The Digital Library functionality may not be used with third-party course content including but not limited to Mawi Learning

IMPORTANT: By issuing a Purchase Order, remitting payment, and/or accessing the licensed product quoted in this proposal, Customer is agreeing to be bound by the terms and restrictions detailed in this quote and to the Terms and Conditions for Use of FLVS Licensed Product(s). A copy of the Terms and Conditions for Use of FLVS Licensed Product(s) can be found at <https://www.flexpointeducation.com/termsandconditions> Powered by BoardOnTrack



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courses. Use of the Digital Library with FlexPoint course content or third-party course content may result in unexpected overage fees. Please see your FlexPoint representative for more information and a list of third-party courses before using the Digital Library.

- Integration with an SIS and/or other software service may result in additional fees. Please see your FlexPoint representative for details.

Length of Term:

- The FlexPoint Hosted Per Student License is an annual renewable license. Customer will have access to the licensed courseware for 12 months from the date access is granted.

Add-On Unlock

Definitions:

- Single Lesson Navigation – Provides FlexPoint-prescribed lesson numbering. Prohibits students from navigating between lessons.
- Module and Lesson Number Removal – FlexPoint-prescribed lesson and module numbers will be removed from the content and assessments.
- Unlock features are enabled only in hybrid-hosted courses and, therefore, may not be available in some courses. Please see your FlexPoint representative for details.

Add-On OneRoster

Terms and Restrictions:

- Customer is responsible for ensuring accuracy of data exchanged between customer's SIS and Buzz.
- Customer must monitor total active student count and set up subdomains at 1,000 active students.

Buzz LMS Administrative Access/Per Enrollment Terms

Terms and Restrictions:

- Administrative access includes but is not limited to reports, dashboards, integration access, customization, enrollment management, and course management.
- Administrative access includes the ability for customer to use or create Customer Created Courses. A "Customer Created Course" is any course not provided to customer by FlexPoint through its FlexPoint hosted license catalog and/or a course that does not contain any FlexPoint course content. FlexPoint content may not be added to a customer-created course shell.
- Enrollments for use in Customer Created Courses may be purchased at \$15 per enrollment. Customer is financially responsible for Customer Created Course overages. An "enrollment" is defined as a student enrolled and active in a single course for 14 days or has completed at least 15% of the course, whichever occurs first.

Length of Term:

- Any enrollments in Customer Created Courses are to be renewed and paid annually at the same time as the customer's FlexPoint Hosted Per Student License renewal. Customer will have access to the Buzz LMS to utilize these enrollments for 12 months from the date access is granted to the customer's FlexPoint Hosted Per Student License.

Add-On Early Access

Terms and Restrictions:

Early Access provides customer with access to FlexPoint-provided content for the sole purpose of customer-provided instructor training and set up of domain and courses in preparation for the coming license period. Enrollment of students is NOT permitted during the Early Access period. If customer enrolls students during Early Access, standard enrollment fees will apply. Please see your FlexPoint representative for details.

Length of Term:

- The Early Access License is limited to the time period indicated on this quote.

Add-On Professional Development/Training Terms

Training Types:

- FlexPoint Hosted PD Courses - includes the use of the LMS (Buzz) to access the PD Course.
- Face-to-Face Training - consists of six (6) hours per day of training in one specified training location.
- Live Webinars - scheduled in one (1) hour increments and includes a link to the recording as long as the customer maintains an active license.
- On-Demand Webinars - access to individual on-demand recordings.

Terms and Restrictions:

- For online delivery of training, a PO must be provided no less than two business days prior to the scheduled training.
- For in person delivery of training, a PO must be provided no less than 10 business days prior to the scheduled training.
- Each live webinar attendee must have access to his or her own device for the entire training.
- Requests to reschedule a Live Webinar must be sent in writing to customer's FlexPoint account team no later than 24 hours before the

IMPORTANT: By issuing a Purchase Order, remitting payment, and/or accessing the licensed product quoted in this proposal, Customer is agreeing to be bound by the terms and restrictions detailed in this quote and to the Terms and Conditions for Use of FLVS Licensed Product(s). A copy of the Terms and Conditions for Use of FLVS Licensed Product(s) can be found at <https://www.flexpointeducation.com/termsandconditions> Powered by BoardOnTrack



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scheduled start time. FlexPoint will provide available dates on which the training may be rescheduled.

- FlexPoint live webinar training is provided through Zoom.
- Any material change to a Live Webinar including, but not limited to, attendee count, topic, and/or training platform (i.e., Zoom, Microsoft Teams, etc.) within 10 business days of scheduled training date may require FlexPoint to reschedule the training to a later date. Additional fees may apply.
- Customers who do not attend a scheduled Live Webinar will not be entitled to a refund or a rescheduled training date.
- On-Demand Webinars are non-refundable.

Length of Term:

- FlexPoint Hosted PD Courses include access to the content for a period of one calendar year from purchase date.
- All other Professional Development/Training services such as Face-to-Face and Live Webinars must be scheduled and delivered within twelve (12) months of purchase.

Add-On Consultative Services Terms

Terms and Restrictions:

- Unless otherwise stated by the order documentation, Consultative Services are charged by the hour, or by the day in the case of face-to-face consultation, for actual work performed in relation to the agreed upon services. This includes but may not be limited to requirement gathering, preparation time, and actual delivery of services or findings to customer.
- Unless otherwise stated by the order documentation, Consultative Service hours will be pre-purchased by the customer and can be used upon no less than 5 business days advance notice to customer's FlexPoint contact.
- Once hours are depleted, customer will be notified and offered the option of purchasing additional hours.
- Consultative services do not include access to FlexPoint courses.

Length of Term:

- Consultative Service hours purchased by customer must be used within one calendar year from purchase date.

GoGuardian® · Pear Deck Learning™

Thank you for your continued partnership, **Excel Academy Charter School!** We look forward to working with you to make the rest of your school year a success, and to ensure a smooth renewal process. Below you will find information relevant to your current contract and 2024 renewal options, *including product options, terms, and associated pricing.*

Current Products and Contract Terms:

Brand(s) Product(s)	Contract Length Expiration Date	Current License Quantity	Notes
GoGuardian Teacher	1-year Exp: 7/31/2024	250 licenses	
GoGuardian Admin	1-year Exp: 7/31/2024	1300 licenses	


Renewal Options:


Renewal Options	Description	3-Year Renewal *Most Cost Savings* 8/1/2024-7/31/2027	2-Year Renewal 8/1/2024-7/31/2026	1-Year Renewal 8/1/2024-7/30/2025
Contract Renewal	GoGuardian Teacher 445 Licenses GoGuardian Admin 1300 Licenses	\$45,247.85 Total GoGuardianTeacher: \$25.93 GoGuardian Admin: \$25.93 <i>*Remove year-over-year escalation by locking in the 2024 rates for multiple years.</i>	\$30,171.05 Total GoGuardianTeacher:\$17.29 GoGuardian Admin: \$17.29 <i>*Remove year-over-year escalation by locking in the 2024 rates for multiple years.</i>	\$15,076.80 Total GoGuardian Teacher: \$8.64 GoGuardian Admin: \$8.64 <i>*Subject to standard price escalation in subsequent years</i>
Contract Renewal + Professional Development Package	Professional Development 4 hour package Split between 2hr virtual sessions w/ a dedicated trainer. Mixed products.	PD only: +\$,1500	PD only: +\$,1500	PD only: +\$,1500

Delayed Invoicing:

Delayed Invoicing is available, allowing you to renew now but delay your invoicing and complete payment in the next fiscal year (July, 2024). Please indicate if you would like to take advantage of this option or prefer to utilize this school year's budget with automatic invoicing. No PO is needed with delayed invoicing.

Add-on Options (click through for demo videos):

	<p>The most complete K-12 web filter - manage filtering policies across all users, regardless of device type, operating system, or browser—from one interface.</p> <p>Chrome, Windows, iOS, MacOS ~ Integrates with Clever & Classlink</p>
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<p>GoGuardian Teacher™</p>	<p><u>Classroom Management and effective instruction for 1:1 environments</u> - create smart and effective digital learning environments that can be customized to meet the needs of the day — or each student.</p>
<p>GoGuardian Beacon®</p>	<p><u>When it comes to student mental health, every second counts</u> - Beacon is an indispensable K-12 safety tool that proactively identifies students in need of help.</p> <p>24/7 Alert Review and Escalation Available</p>
	<p><u>Pear Deck</u> ~ Drive student-teacher interactions with interactive presentations.</p>
	<p><u>Pear Assessment</u> ~ Improve student learning using standards-based assessment tools.</p>
	<p><u>Pear Deck Tutor</u> ~ Connect students with 1:1 tutoring tailored to their learning style.</p>
	<p><u>Pear Practice</u> ~ Facilitate differentiated practice to help accelerate student mastery.</p>



Enome, Inc. (Goalbook)
 P.O. Box 1289
 San Mateo, CA 94401
 -
 Phone: 1-855-207-5443
 Fax: (650) 284-0432
 FEIN: 45-2540420

QUOTE 2414571-0
Excel Academy (CA)

31 May 2024
 Due 30 Jun 2024 (NET 30)

Qty	Unit	Description	Price	Total
1.0	Product	Full District Membership - Goalbook Toolkit access for up to 15 users, including all Goalbook Services	\$ 10,425.00	\$ 10,425.00
Total Due:				\$10,425.00

Quote Notes

Goalbook Toolkit Full District Membership - Goalbook Toolkit access for up to 15 users in Excel Academy (CA), active until June 30, 2025.

Goalbook services include:

- Initial webinar training
- 1 mid-year consultation/webinar
- Dedicated Goalbook Success team member to work in partnership with district and school implementation leads throughout the year
- Access to ongoing webinars that feature a variety of content areas to build teacher capacity for improving instructional practice
- Analytics services for leadership upon request
- Dedicated Goalbook help desk and technical support

 If a Purchase Order is generated, you can email it to support@goalbookapp.com or fax to (650) 284-0432, and we will add the PO # to the invoice.

This order form is entered into and effective as of the form date set forth above by and between Enome, Inc. and the Client identified above. This order form incorporates the Goalbook Terms and Conditions (goalbookapp.com/terms) (collectively the "Agreement"). All fees are non-cancellable and non-refundable. By paying the fees above, you signify that you have read, understood, and agree to be bound by the Agreement, and that you have the authority to bind your organization to the Agreement.



Service Order

Customer Name and Contact Information

Name: Excel Academy California

Address: 1 Technology Drive, Ste. I-811 Irvine, CA

Customer Primary Point of Contact

Name: Cindy Mendez

Email Address: studentservices@excelacademy.education

Customer Secondary Point of Contact

Name:

Email Address:

PresenceLearning Contact Information

Name: Nas Syed

Email Address: nas.syed@presence.com

Service Order

Other Fees

Service	Licenses	Price	Total
Kanga - Starter	0	\$0.00	\$0.00
Kanga - Elite	3	\$2,730.00	\$8,190.00
Kanga - Pro	3	\$2,310.00	\$6,930.00
Kanga - Premier	0	\$2,000.00	\$0.00
Kanga - Premier AA	0	\$2,000.00	\$0.00

Service Order

Service Order Term	July 1, 2024 through June 30, 2025
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Service Order Form

Except as expressly set forth in this Service Order, the parties agree to be bound by the terms of the Master Service Agreement ("Agreement"). To the extent there is any conflict between this Service Order and the Agreement, this Service Order shall govern. The terms of this Service Order are confidential information.

The parties have executed this Service Order as of the date of the last signature ("Service Order Effective Date").

PresenceLearning, Inc.	Customer
By:	By:
Name:	Name: Cindy Mendez
Title:	Title:
Date:	Date:



MASTER SERVICES AGREEMENT

This Master Services Agreement (“MSA”) is entered into as of the date of the last signature set forth on the signature page attached hereto (“Effective Date”), by and between PresenceLearning, Inc., a Delaware corporation with a place of business located at 530 Seventh Ave, Suite M1, New York, NY 10018 (“Presence”), and the undersigned customer (“Customer”). Each of Presence and Customer may individually be referred to as a “Party” and collectively referred to as the “Parties”.

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, Presence and Customer, hereby agree as follows:

1. Structure of the Agreement. This MSA shall apply each time Customer engages with Presence for the provision of services and/or products, including, if applicable, the assessments set forth on <https://presencelearning.com/school-and-district-customer-assessments/> (collectively, “Services”). The Services shall be described in one or more schedules (each, a “Schedule”), service orders (each, a “Service Order”), and/or exhibits (each, an “Exhibit”), each of which shall reference this MSA and, with respect to each Schedule or Service Order, shall be executed by the Parties. Each Schedule, Service Order, and Exhibit entered into or delivered hereunder (each an “Incorporated Document”, and collectively, “Incorporated Documents”) may provide additional terms and conditions related to the Services. This MSA and the Incorporated Documents are collectively referred to herein as the “Agreement”. In the event of a conflict between the terms of this MSA and the terms of any Incorporated Document, the terms of the MSA shall control; provided, however, that the Parties may in any Incorporated Document specifically (i.e., with reference to the MSA) agree to: (a) exclude or except an otherwise controlling provision of this MSA; (b) adopt a clause or provision to apply in lieu of an otherwise controlling provision of this MSA; or (c) reference a governing external code, document, or standard that will apply in lieu of any otherwise controlling provision of this MSA (or any Incorporated Document).

2. Fee and Payment Terms. Customer shall pay all fees (collectively, “Fees”) specified in the Schedule or Service Order for the purchased Services. Fees are due and payable thirty (30) calendar days from date of invoice, unless specified otherwise in a Service Order. Customer may dispute an invoice no later than twenty (20) calendar days from the date of the invoice. The Parties will work together in good faith to resolve any disputes as soon as possible. Upon resolution, Customer shall remit the amount owed within ten (10) calendar days. Customer is responsible for all taxes, except for taxes on Presence’s income, unless Customer provides a state tax exemption certificate. If Customer does not submit a tax exemption certificate to Presence, Customer will be invoiced for any applicable taxes.

3. Term; Termination; Effects of Termination.

3.1. Term. The term of this MSA commences on the Effective Date and continues until terminated by either party pursuant to Section 3.2 (such period, the “Term”). Each Incorporated Document shall have the term specified therein.

3.2. Termination. This MSA or any Incorporated Document may be terminated: (a) by either Party without cause upon sixty (60) calendar days prior written notice to the other Party; (b) by Presence upon any failure of Customer to pay when due any Fees (as defined in Section 2); provided, however, that in lieu of terminating the MSA or any Incorporated Document, Presence may, at its sole option, suspend Services, in whole or in part; (c) by either Party with cause upon a non-payment related material breach of the Agreement by the other Party which breach is not cured within fifteen (15) calendar days after the breaching Party receives written notice of the breach from the non-breaching Party; or (d) immediately by Customer upon a payment equal to the product of (x) eight (8) and (y) the Weekly Dedicated Hours (if Weekly Dedicated Hours are included in the Service Order).

3.3. Effects of Termination. Upon the termination of the MSA or the expiration or termination of any Incorporated Document for any reason, (a) all Fees owed to Presence that accrued before such termination or expiration will be immediately due and payable, except for any such amounts being disputed in good faith by Customer in accordance with Section 2 and (b) Customer shall not be entitled to a refund for any annual Fees paid by Customer prior to the date of termination of the MSA or any Incorporated Document.

4. Services and Platform; Platform Specifications.

4.1. Services and Platform. Presence shall provide Customer with the Services and technical support set forth on each Service Order. All Services shall be delivered via Presence's proprietary web-based application (together with any components, software, or related documentation, the "Platform"). The applicable license granted by Presence to Customer with respect to Platform usage will be as set forth in the applicable Service Order.

4.2. Platform Specifications and Support. As a web-based application, the Platform requires certain equipment for optimal performance, see tech specifications at (<https://www.presencelearning.com/tech-requirements/>). Presence will provide technical support on weekdays between the hours of 8:00AM and 8:00PM Eastern Time. Customer may purchase necessary equipment from Presence pursuant to the terms and conditions set forth on the Equipment Schedule.

4.3. Platform Restrictions.

4.3.1. Customer shall not for itself or through a third party (and shall ensure that its authorized users): (i) translate, reverse engineer, decompile, or disassemble the Platform, or by any other method attempt to derive source code to the Platform; (ii) sublicense, rent, lease, loan, assign, transfer, share, or resell the Platform; (iii) make the Platform available to third parties; (iv) create derivative works based on the Platform, or use the Platform for any purpose other than as provided for in this Agreement (including, without limitation, altering any notices of intellectual property or other proprietary rights); or (v) make copies of documentation contained within the Platform.

4.3.2. If Customer breaches the terms of this Agreement or if Customer or any of its authorized users misuse the Platform or violate any laws with respect to the Platform, Presence may suspend or terminate Customer's and its authorized users' access to the Platform and remove any material it deems offensive or in violation of this Section 4.3.2. Neither Customer or its authorized users may:

4.3.2.1. Circumvent any access or use restrictions put into place to prevent certain uses of the Platform or areas of the Platform or attempt to disable, impair, or destroy the Platform by, among other things, uploading, transmitting, storing, or making available any materials that contain any viruses, malicious code, malware, or any components;

4.3.2.2. Engage in behavior that violates any copyright, moral rights, trademark, trade dress, patent, trade secret, unfair competition, right of privacy, right of publicity, or any other proprietary rights of any third party;

4.3.2.3. Upload to the Platform and/or share any material that is unlawful, harmful, threatening, obscene, violent, abusive, tortious, defamatory, libelous, vulgar, lewd, profane, hateful, or otherwise objectionable, as determined in the sole discretion of Presence, or share any of materials that sexualize minors or that is intended to, or could potentially, facilitate inappropriate interactions with minors, or other users;

4.3.2.4. Disrupt, interfere with, or inhibit any other user from using the Platform (such as stalking, intimidation, harassment, or incitement or promotion of violence or self-harm); or

4.3.2.5. Take photos or screenshots of the Platform and/or post on social media or engage in any other behavior that violates the confidentiality of Platform.

5. Parties' Proprietary Rights; Other Rights.

5.1. Presence Proprietary Rights. Presence owns all rights, title, and interest in and to the Platform and retains all rights and title to all proprietary content in the Platform, including therapy playlists and related documents and content, and retains all rights, title and interest to any work product or other intellectual property developed and/or created by, or on behalf of, Presence (collectively, "Presence Intellectual Property").

5.2. Other Rights. Customer grants to Presence the limited right to use Customer's name, logo and/or other marks for the sole purpose of listing Customer as a customer in promotional materials. Customer may revoke this grant at any time by notifying Presence in writing.

6. Confidentiality.

6.1. Confidential Information. All information disclosed by one Party (in such capacity, the “Disclosing Party”) to the other Party (in such capacity, the “Receiving Party”) during the Term that is either identified in writing at the time of disclosure as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of the disclosure, whether in oral, written, graphic or electronic form, shall be deemed to be “Confidential Information.”

6.2. Exceptions. Information will not be considered Confidential Information if the information is or was: (i) publicly available through no act or omission of the Receiving Party; (ii) in the Receiving Party’s lawful possession prior to disclosure by the Disclosing Party and not obtained either directly or indirectly from the Disclosing Party; (iii) lawfully disclosed to the Receiving Party by a third party without restriction on disclosure; or (iv) independently developed by the Receiving Party without use of or access to the Disclosing Party’s Confidential Information.

6.3. Nondisclosure. The Parties agree, that during the Term and for a period of one year thereafter (or, as applicable, with respect to Confidential Information that is a trade secret, indefinitely) after its termination, to hold each other’s Confidential Information in confidence and not to disclose such information in any form to any third party without the express written consent of the disclosing party, except to employees, subcontractors, or agents (collectively, “Representatives”) who are under a written non-disclosure agreement protecting the applicable Confidential Information in a manner no less restrictive than this Agreement. Each Party shall remain responsible for any breaches of this Section 6.3 by any of such Parties’ Representatives.

7. Clinician Conversion; Conversion Fee.

7.1. Clinician Conversion. During the Term of this Agreement, Customer may not, directly or indirectly, solicit, induce, hire, or attempt to induce or hire any Presence clinician except in accordance with the terms set forth in this Section 7.

7.2. Conversion Fee. During any Service Order Term, and for a period of twelve months thereafter, Customer shall notify Presence of its intent to offer employment to any clinician not less than ten (10) calendar days prior to offering such employment (any clinician that accepts such offer of employment, a “Converted Clinician”). Upon the date a Converted Clinician commences employment with Customer (the “Conversion Effective Date”): (i) the Converted Clinician shall be allowed to continue to utilize the Platform (in the same manner and with the same functionality as the Converted Clinician utilized the Platform prior to the Conversion Effective Date) through the earlier of the expiration of the then-current school year or the Service Order Term pursuant to which the Converted Clinician was performing Services hereunder prior to becoming a Converted Clinician and (ii) Customer shall pay Presence a fee of \$20,000.

8. Customer Data; State Privacy Laws; FERPA; HIPAA.

8.1. Customer Data. Customer retains all rights, in and to all data, files, and information, provided by Customer or its authorized users to Presence (“Customer Data”). During the Term, Customer grants to Presence, solely in connection with Presence’s performance of its obligations hereunder, a limited non-exclusive, royalty-free license to modify, display, combine, copy, store, transmit, and otherwise use Customer Data that is uploaded to the Platform.

8.2. State Privacy Laws. Presence is, and at all times has been, in material compliance with all applicable federal and state laws, rules, and regulations relating to privacy, data protection, and the collection and use of Personal Information collected, used, and held for use by Presence.

8.3. FERPA. In connection with the performance of Services, Presence may have access to education records (“FERPA Records”) that are defined in and subject to the Family Educational Rights and Privacy Act, 20 U.S.C. 1232g, et seq. and related regulations (“FERPA”). To the extent that Presence has access to FERPA Records, Presence is deemed a “school official” and may use FERPA Records solely for the specific “legitimate educational purposes” as defined under FERPA. Student records disclosed to Presence by Customer and maintained within Platform are by definition “education records” under FERPA and not “protected health information” under HIPAA. Because student health information in education records is protected by FERPA, the HIPAA Privacy Rule excludes such information from its coverage. See the exception paragraph (2)(i) in the definition of “protected health information” in the HIPAA Privacy Rule at 45 CFR § 160.103. See, also, Joint Guidance on the Application of the Family Educational Rights and Privacy Act (FERPA) and the Health Insurance Portability and Accountability Act of 1996 (HIPAA) to Student Health Records. Presence’s FERPA policy may be accessed at <https://www.presencelearning.com/about/ferpa/>.

8.4. HIPAA. In connection with the performance of Services, Presence may have access to certain “protected health information” under the Health Insurance Portability and Accountability Act of 1996 (“HIPAA”). Presence hereby represents that the Presence Platform complies with all applicable HIPAA regulations.

9. **Indemnification.**

9.1. Indemnification by Customer. Unless prohibited by law or school district regulations, Customer shall indemnify and hold Presence harmless against any and all claims, demands, damages, liabilities and costs (including reasonable attorney’s fees) incurred by Presence or its Representatives arising, directly or indirectly, from any breach of this Agreement, the negligent act or omission or willful misconduct of Customer, its agents, or employees, pertaining to its activities and obligations under this Agreement, or Customer’s or its authorized users’ illegal behavior or conduct (collectively, “Presence Indemnifiable Claims”), including reasonable costs incurred in connection with preparing to defend against any Presence Indemnifiable Claims.

9.2. Indemnification by Presence. Presence shall indemnify and hold Customer and its Representatives, harmless against any and all claims, demands, damages, liabilities and costs (including reasonable attorney’s fees) incurred by Customer arising, directly or indirectly, from any breach of this Agreement, the negligent act or omission or willful misconduct of Presence, its agents, or employees, pertaining to Presence’s activities and obligations under this Agreement (collectively, “Customer Indemnifiable Claims”), including reasonable costs incurred in connection with preparing to defend against any Customer Indemnifiable Claims.

9.3. Conditions of Indemnification. The obligations set forth in Sections 9.1 and 9.2 are conditioned upon: (a) prompt written notice by the indemnified party to the indemnifying party of any claim, action, or demand for which indemnity is claimed; (b) complete control of the defense and settlement thereof by the indemnifying party, provided that no settlement of an indemnified claim shall be made without the consent of the indemnified party, such consent not to be unreasonably withheld or delayed; and (c) reasonable cooperation by the indemnified party in the defense as the indemnifying party may request. The indemnified party shall have the right to participate in the defense against the indemnified claims with counsel of its choice at its own expense.

10. **Limitation of Liability.**

10.1. DAMAGE DISCLAIMER. IN NO EVENT SHALL EITHER PARTY BE LIABLE FOR ANY CONSEQUENTIAL, INDIRECT, INCIDENTAL, PUNITIVE, OR SPECIAL DAMAGES WHATSOEVER, INCLUDING WITHOUT LIMITATION, DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, AND THE LIKE, ARISING OUT OF THIS AGREEMENT, EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

10.2. GENERAL DAMAGE CAP. IN NO EVENT SHALL PRESENCE BE LIABLE IN THE AGGREGATE FOR ANY DAMAGES OR LOSSES IN EXCESS OF THE GREATER OF THAN THE AMOUNT CUSTOMER PAID FOR SERVICES DURING A THREE-MONTH PERIOD PRECEDING THE EVENT GIVING RISE TO THE LIABILITY. THESE LIMITATIONS APPLY TO THE MAXIMUM EXTENT PERMITTED BY LAW EVEN IF (A) A REMEDY DOES NOT FULLY COMPENSATE CUSTOMER FOR ANY LOSSES OR (B) PRESENCE KNEW OR SHOULD HAVE KNOWN ABOUT THE POSSIBILITY OF DAMAGES.

11. **Disclaimer of Warranties**. Except as otherwise set forth herein, the Services and Platform are provided “as is” without any warranty and, except as provided herein, Presence expressly disclaims any and all warranties, express, implied, or statutory, including warranties of title, non-infringement, merchantability, and fitness for a particular purpose. Further, Presence disclaims any warranty that the Platform will meet Customer’s requirements or will be constantly available, uninterrupted, timely, secure, or error-free. In addition, Presence disclaims all liability for any actions resulting from Customer’s use of the Platform. Customer understands that Customer’s use and access to the Platform is at Customer’s own discretion and risk. If Customer Authorized Users upload materials to the Platform, Presence is not responsible for any loss, corruption, damage, or deletion of the materials.

12. **Representations and Warranties.**

12.1. Customer. Customer represents and warrants that Customer: (a) has the full right, power, and authority to enter into this Agreement; (b) has assessed the Platform’s necessary specifications and functionality and found it suitable for Customer’s needs.

12.2. Presence. Presence represents and warrants that Presence: (a) has the full right, power, and authority to enter into this Agreement and (b) has used commercially reasonable efforts to prevent the introduction of, and to the knowledge of Presence, the Platform does not contain any, software viruses, time or logic bombs, trojan horses, worms, timers or clocks, trap doors or other malicious computer instructions, devices, or techniques.

13. **Miscellaneous.**

13.1. Compliance with Laws. Each Party shall comply with all laws, rules, and regulations, if any, applicable to it in connection with the performance of its obligations under the Agreement.

13.2. Competitors. Customer agrees, and will ensure its Authorized Users', to not share or make available the Platform or Presence Property to a competitor of Presence.

13.3. Survival. Sections 2, 4.3, 5.1, 9–11, and 13 will survive expiration or termination of this Agreement.

13.4. Amendments and Modifications. Any amendment and modifications to this Agreement must be in writing, reference the Agreement, and be executed by both Parties.

13.5. Third-Party Beneficiaries. This Agreement is not intended to benefit, nor shall it be deemed to give rise to, any rights to any third party.

13.6. Assignment. Customer shall not assign or otherwise transfer its rights or delegate its obligations under the Agreement, in whole or in part, without the prior written consent of Presence and any attempt to do so will be null and void. Presence may assign or transfer its rights to an affiliate or to a third party due to a merger, consolidation, change of control, sale of all or substantially all of its securities or assets, contract, management agreement, or otherwise.

13.7. Force Majeure. Neither Party shall be liable for failing or delaying the performance of its obligations (except for the payment owed for services rendered) resulting from any condition beyond its reasonable control, including but not limited to, governmental action, acts of terrorism, earthquake, fire, flood, epidemics, pandemics or other acts of God, labor conditions, power failure, and Internet disturbances. Presence will not be responsible for receiving data, queries, or requests directly from Customer's Authorized Users, student users, or any other third party, or for the transmission of data between Customer's authorized users or student users and the Platform.

13.8. No Waiver. The failure to require performance of any provision of this Agreement shall not affect a Party's right to require performance at any time thereafter; nor shall any waiver of a breach of any provision constitute a waiver of the provision itself.

13.9. Notices. All notices relating to this Agreement must be in writing, sent by postage prepaid first-class mail, courier service, or via email: To Presence send to: PresenceLearning, Inc., 530 Seventh Ave, Suite M1, New York, NY 10018, Attn: Legal Department or via email at legal@presencelearning.com. To Customer: Notices will be sent to the physical or email address provided to Presence, or by other legally acceptable means.

13.10. Independent Contractors. The Parties are and shall remain independent contractors and nothing in this Agreement shall be deemed to create any agency, partnership, or joint venture relationship between the Parties. Neither Party shall be deemed to be an employee or legal representative of the other nor shall either Party have any right or authority to create any obligation on behalf of the other Party.

13.11. Arbitration. Any controversy or claim arising out of or relating to this Agreement, or the breach thereof, shall be settled by arbitration administered by the American Arbitration Association ("AAA") in accordance with its Commercial Arbitration Rules, and judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof. The arbitration proceedings shall be confidential and conducted in the English language before a single neutral arbitrator is selected by AAA. The place of arbitration shall be mutually agreed upon by the Parties.

13.12. Entire Agreement. This Agreement, including any Incorporated Documents, constitutes the entire agreement between the Parties with respect to the subject matter and supersedes all other prior agreements and understandings, both written and oral, between the Parties.

13.13. Governing Law. This Agreement and all disputes or controversies arising out of or relating to this Agreement are governed by the law of the state the Customer is located.

13.14. Counterparts; Electronic Signatures. This Agreement may be executed in one or more counterparts, each of which shall be deemed to be an original but all of which together shall constitute one and the same instrument and shall become effective when one or more counterparts have been signed by each of the Parties and delivered to the other Party. A facsimile, PDF, or other electronic signature of this Agreement shall be valid and have the same force and effect as a manually signed original.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the Effective Date.

PRESENCELEARNING, INC:	CUSTOMER:
By: _____ Name: _____ Title: _____ Date: _____	By: _____ Name: _____ Title: _____ Date: _____

EQUIPMENT PURCHASE SCHEDULE

This Equipment Purchase Schedule (the “Equipment Purchase Schedule”) is incorporated and made part of the Master Services Agreement (the “MSA”) between Presence and Customer and lists the terms and conditions upon which Customer may purchase hardware, Test Kits, OT Kits and materials (collectively “Equipment”) from Presence. Unless otherwise defined herein, capitalized terms shall have the definition set forth in the Agreement.

1. Hardware Available for Purchase. Customer may, at Customer’s option, purchase the hardware set forth below at the purchase prices set forth opposite each hardware type (note that the listed prices do not include any applicable tax or shipping costs):

Equipment Type	Price per unit
Standard webcam with tripod	\$49.00
ANDREA Over Ear USB headset	\$29.00
ANDREA 455 Stereo headset	\$25.00
ANDREA Y-100B Splitter	\$5.00
ANDREA USB Sound Card Adapter	\$14.00
Document Camera	\$90.00

Customer is not restricted from purchasing hardware from any other vendor or any third-party. A list of the recommended hardware providers and specifications is provided at <https://presencelearning.com/tech-requirements/>.

2. WISC-V and WAIS-IV Kits.

2.1 Purchase of WISC-V Kits and/or WAIS -IV Kits. If Customer has access to WISC-V and/or WAIS-IV assessments, Customer may purchase WISC-V and/or WAIS-IV test kits (each, a “Test Kit”) from Presence. Test Kits are not included in the price of the assessments. Each Test Kit comes with one (1) set of Block Design Blocks and one (1) Block Design Stimulus Book for use in connection with the WISC-V and/or WAIS-IV assessments. Prices of the Test Kits will be reflected in the Service Order entered into at the time the Test Kits are to be purchased.

WISC-V / WAIS -IV	Price per unit
Block Design only Stimulus Book	\$11.00
Block Design Blocks	\$46.00

2.2 Tracking and Return of Kits. Customer understands and acknowledges that the Test Kits are considered trade secrets by their respective publishers and will make commercially reasonable efforts to retrieve the Test Kit from each student who received one. After a Test Kit has been used by a student, Customer must arrange for the return of the Test Kit directly to Customer. On a quarterly basis, Customer will acknowledge and confirm to Presence that the Test Kits are in Customer’s possession (in a mutually agreed upon manner). At no time will a Test Kit remain in the possession of a Customer’s student once it has been used.

3. OT Kits. Customer may purchase Occupational Therapy Kits (each, an “OT Kit”) for a fee of \$85.00 per OT Kit. Each OT Kit includes materials that may be utilized in occupational therapy sessions.

4. Delivery and Delivery Address; FOB; Delivery Dates; Received and Accepted.

4.1 Delivery and Delivery Address. Presence will ship Equipment to the addresses provided by Customer. Customer is solely responsible for providing the correct shipping address for each addressee that is to receive the Equipment. If Customer provides an incorrect address, then Customer will purchase replacement Equipment that

will be delivered to the correct address. If Equipment is misdelivered due to Presence's error, Presence will promptly ship replacement Equipment to the correct address at no cost to Customer.

4.2 **FOB.** Presence shall ship and deliver the Equipment FOB destination, and the title to and risk of loss of the Equipment will pass to Customer upon delivery.

4.3 **Delivery Dates.** All delivery dates are approximate. Presence shall not be liable for any losses, damage, penalties or expenses for failure to meet any expected delivery date.

4.4 **Received and Accepted.** Equipment is deemed received and accepted upon delivery to the address provided by Customer.

5. Inspection of Goods. Customer has the right to examine the Equipment upon receipt and has 3 days in which to notify Presence of any claim for damages based on the condition of the Equipment. Such notice must specify in detail the particulars of the claim. Failure to provide such notice within the requisite time period constitutes irrevocable acceptance of the equipment. Defective Equipment must be returned to Presence in accordance with accepted trade practices.

6. Fees; Payment. Customer agrees to pay for the Equipment according to the terms set forth in the applicable Service Order. Customer is responsible for all taxes and shipping, which fees may vary based on shipment destination.

7. Disclaimer of Warranty. Presence is not the manufacturer of the Equipment and the Equipment is being sold "as is," and Presence disclaims all warranties of quality, whether express or implied, including the warranties of merchantability and fitness for a particular purpose.

8. Delay or Failure to Perform. Presence will not be liable to Customer for any delay, non-delivery or default due to labor disputes, transportation shortage, Acts of God, or any other causes outside of Presence's control. Presence shall notify Customer immediately upon realization that it will not be able to deliver the Equipment as promised.

PLATFORM LICENSE SCHEDULE

This Platform License Schedule (“Platform License Schedule”) is incorporated and made part of the Master Services Agreement (“MSA”) between Presence and Customer and lists the terms and conditions for the Platform License. Capitalized terms not defined in this Platform License Schedule shall have the meaning set forth in the MSA. In the event of a conflict between this Platform License Schedule and the MSA, unless specifically referenced herein, the MSA shall govern.

1. **Definitions.** With respect to all Services provided pursuant to this Platform License Schedule, the following terms shall have the meanings set forth below:

“Authorized Users” or “Authorized User” means Customer’s teachers or staff who are recruited, managed, and employed or contracted by Customer, and for whom a license is purchased.

“Improvement” means any invention, modification, addition, derivative work, enhancement, revision, translation, abridgment or expansion to or arising from a work, or any other form in which a work or any part thereof, may be recast, transformed, or adapted.

“Personal Information” and/or “PI” means information that can identify a specific individual.

“Student Data” means any PI belonging to a Student User.

“Student User” or “Student Users” means the Customer’s students currently enrolled at Customer’s organization.

“Telehealth Institute” means proprietary self-guided training modules.

“Therapy Room” means a clinician-specific, web-based, private online room on the platform only accessible by specific link controlled by the clinician to whom a virtual therapy room is assigned.

2. **License.**

2.1 **License Grant.** During the Service Order Term (as such term is defined in the Service Order), Presence grants to Customer a limited, non-exclusive, revocable, non-sublicensable, royalty-free, license for each Authorized User to use and display the Platform (the “License”).

2.2 **Business Use.** Customer agrees that it will inform and instruct its Authorized Users that the Platform and Presence Intellectual Property are solely and exclusively to be used for the benefit of the Customer and Customer’s Student Users (“Business Use”). Authorized Users may not use the Platform or any Presence Intellectual Property for personal or independent business purposes. The use of the Platform and/or Presence Intellectual Property for any purpose other than Business Use will constitute cause for immediate termination of this Platform License.

2.3 **Disclosure of Improvements and Developments.** Unless otherwise provided herein, Presence will have no obligation to disclose to Customer any Platform Improvements.

2.4 **Acknowledgements.** Customer acknowledges and agrees that Presence is in the business of commercially licensing the Platform and providing services relating to the Platform to third parties and that the Platform may contain errors. PRESENCE SHALL NOT HAVE ANY DUTIES OR RESPONSIBILITIES OTHER THAN THOSE SPECIFICALLY SET FORTH IN THE INCORPORATED DOCUMENTS AND NO IMPLIED OBLIGATIONS SHALL BE READ INTO THE INCORPORATED DOCUMENTS.

3. **Platform Fees.** The Annual Fee for use of the License shall be set forth in the Service Order and is non-refundable and payable within thirty (30) days of the signing of the Platform License Schedule.

4. **Service Options:**

Service Option	Description
Kanga - Starter	<ul style="list-style-type: none"> ● Limited monthly access to Therapy Room, activities, and games. ● Organizational and documentation tools and features. ● Administrator Dashboard that enables one administrator to track usage of the account.
Kanga - Premier	<ul style="list-style-type: none"> ● Unlimited access to Therapy Room, activities, and games. ● Organizational and documentation tools and features. ● Administrator Dashboard that enables one administrator to track usage of the account.
Kanga - Pro	<p>All the benefits of the Kanga - Premier plus the ability for each Authorized User to administer up to 50 components/batteries of assessments per year. The selection of available assessments will be based on the administering Clinician’s discipline.</p>
Kanga - Elite	<p>All the benefits of the Kanga Premier plus each Clinician will have unlimited access to all assessments within the Clinician’s discipline, including, as applicable, all speech, cognitive ability, and academic assessments.</p>
Kanga - Premier Academic Achievement (For SPED and Gen Ed teachers who only need access to assessments)	<p>Access to Therapy Room and unlimited access to academic achievement assessments.</p> <p>Administrator Dashboard that enables one administrator to track usage of the account.</p>

Customer may designate alternate Authorized Users for Kanga – Premier, Kanga – Pro, Kanga – Elite, and Kanga – Premiere Academic Achievement and, if applicable, all such Authorized Users will have access to assessments specific to their disciplines.



REQUIRED FOR SHIPPING

All fields required. Orders require a purchase order before shipping. Orders begin shipping in April for the next school year. Orders default to partial shipping in mid-August unless specified otherwise. Someone must be present to sign for delivery.

Billing Name, Phone, Email (Billing contact if different than listed)

Billing PO #

Shipping Name, Phone, Email

Shipping Address (if different from listed)

REQUIRED: When are you NOT available to receive the materials?

No shipping restrictions _____
Exclusion Dates for receiving

REQUIRED: Would you like to receive your materials as they become available or would you like us to hold your order until all can be shipped together?

Partial Ship Whole Ship

Authorized Signature Date

To cancel an order, contact Customer Service BEFORE your order is shipped. Returns and refunds must be in original, unused condition and returned within 30 days. The customer pays return shipping and a \$10 restocking fee per classroom box.

By signing this quote, you agree to all terms and conditions at <http://studiesweekly.com/legal>

Please submit this quote with your purchase order.

Occasionally, due to weather or other unforeseen circumstances, delivery may take longer than expected. However, you will have online access to your curriculum before that, depending on the time of year and if you roster your students.

QUOTE #91252

Quote Issued: 04/17/2024
Expiration: 08/31/2024
School Year: 2024-2025
Referral: Sales Rep
School Start Date: 08/16

REQUESTER

NICOLE TANNER
EXCEL ACADEMY CHARTER
1 TECHNOLOGY DR
IRVINE, CA 92618-2339
ntanner@excelacademy.education
949-742-2399

CONTACT US

1140 N 1430 W Orem, UT 84057
Phone: 866-311-8734 | Fax: 866-531-5589
Email: orders@studiesweekly.com

REGIONAL MANAGER

Cody Erickson
cody.erickson@studiesweekly.com
385-335-4885

ACCOUNT MANAGER

Mindy Erickson
mindy.erickson@studiesweekly.com

TERMS AND CONDITIONS

Please visit <http://www.studiesweekly.com/legal/> to learn more about our legal terms.

Grade	SKU	Title	Class	Unit Price	Qty	Cost
Social Studies						
0	CASW0	California Studies Weekly: Together Now and Long Ago (Online Only)	2	\$7.95	50	\$397.50
0	CASWTK	California Early Learning Studies Weekly (Online Only)	2	\$7.95	40	\$318.00
1	CASW1	California Studies Weekly: My Place in Time and Space (Online Only)	4	\$7.95	90	\$715.50
2	CASW2	California Studies Weekly: People Who Make a Difference (Online Only)	3	\$7.95	60	\$477.00
3	CASW3	California Studies Weekly: Continuity and Change (Online Only)	3	\$7.95	70	\$556.50
4	CASW4	California Studies Weekly: A Changing State (Online C	3	\$7.95	60	\$477.00
5	CASW5	California Studies Weekly: U.S. History and Geography (Online Only)	3	\$7.95	70	\$556.50
6	CA6	California World History Studies Weekly (Online Only)	4	\$7.95	90	\$715.50
Total						\$4213.5

Science						
0	SWSN0	Science Studies Weekly - Kindergarten (Online Only)	3	\$7.95	60	\$477.00
1	SWSN1	Science Studies Weekly - First Grade (Online Only)	4	\$7.95	100	\$795.00
2	SWSN2	Science Studies Weekly - Second Grade (Online Only)	4	\$7.95	80	\$636.00
3	SWSN3	Science Studies Weekly - Third Grade (Online Only)	3	\$7.95	70	\$556.50
4	SWSN4	Science Studies Weekly - Fourth Grade (Online Only)	3	\$7.95	70	\$556.50
5	SWSN5	Science Studies Weekly - Fifth Grade (Online Only)	3	\$7.95	60	\$477.00
6	S6	Science Studies Weekly Sixth Grade - Endeavor (Onlin	4	\$7.95	90	\$715.50
Total						\$4213.5

Sub Total: \$8,427.00



Tax: \$0.00
Shipping: \$0.00

Total: \$8,427.00

QUOTE #91252

Quote Issued: 04/17/2024
Expiration: 08/31/2024
School Year: 2024-2025
Referral: Sales Rep
School Start Date: 08/16

Thank you,

for your interest in Studies Weekly. If you are ready to purchase, please provide the information above and submit your order.

REQUESTER

NICOLE TANNER
EXCEL ACADEMY CHARTER
1 TECHNOLOGY DR
IRVINE, CA 92618-2339
ntanner@excelacademy.education
949-742-2399

CONTACT US

1140 N 1430 W Orem, UT 84057
Phone: 866-311-8734 | Fax: 866-531-5589
Email: orders@studiesweekly.com

REGIONAL MANAGER

Cody Erickson
cody.erickson@studiesweekly.com
385-335-4885

ACCOUNT MANAGER

Mindy Erickson
mindy.erickson@studiesweekly.com

TERMS AND CONDITIONS

Please visit
<http://www.studiesweekly.com/legal/>
to learn more about our legal terms.



RENEWAL QUOTE

IXL Learning
 777 Mariners Island Blvd., Suite 600
 San Mateo, CA 94404

QUOTE # 1595742-2024-001-5
 DATE: APRIL 26, 2024

TO:
 LaKeyshia Ono
 Excel Academy
 1 Technology Drive
 Suite I-811
 Irvine, CA 92618-2339

COMMENTS OR SPECIAL INSTRUCTIONS

SALESPERSON	ACCOUNT #	RENEWAL PERIOD	QUOTE VALID UNTIL
Stephanie Souter	A16-1595742	August 23, 2024 – August 23, 2025	August 23, 2024

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
1	IXL site license for 450 students, including: Grades PK-12: 250 students Subjects: Math, ELA, Science, and Social studies	\$6,000.00	\$6,000.00
1	Math in grades 1-5: 100 students Subject: Math	\$1,250.00	\$1,250.00
1	ELA in grades 1-5: 100 students Subject: ELA	\$1,250.00	\$1,250.00
	<i>K-8 math licenses include complimentary access to IXL's universal screener</i>		
1	Volume discount	-\$225.00	-\$225.00
1	IXL Elevate I: Effective Implementation (virtual professional learning session) <i>Unlimited instructor accounts included</i>	\$695.00	\$695.00
		SUBTOTAL	\$8,970.00
		SALES TAX	–
		SHIPPING & HANDLING	–
		TOTAL DUE	\$8,970.00

Ordering instructions

We accept payment by purchase order, check, or credit card. To submit a purchase order for this quote, [click here](#) or go to <http://www.ixl.com/po-upload> and enter quote # 1595742-2024-001-5. For international accounts, we can accept wire transfers for an additional fee.

QUOTE-P73256

Notable, Inc (Kami)

8605 Santa Monica Blvd, PMB 57387.
West Hollywood, CA 90069-4109 U.S.

Phone: +1 (650) 395-8986 Email: sales@kamiapp.com

Bill To: Community Collaborative (CA)
1 Technology Dr., Bldg. I-811
Irvine, CA 92618, United States

Quote Issued Date: 04/22/2024
Quote Expiry Date: 10/03/2024
School Year: SY 2024-2025

Ship To: Community Collaborative (CA) Excel Academy Charter, Irvine (CA)
Contact Person: LaKeyshia Ono
Email: lono@excelacademy.education

Kami Contact: sales@kamiapp.com
Email: sales@kamiapp.com

Item & Description	Unit	Price Per Unit	Amount
School Plan Includes unlimited virtual learning sessions with an experienced teacher and Kami expert. Book here: https://www.kamiapp.com/book-a-training/	1675	\$3.50	\$5,862.50
In-Person Professional Learning September to June Optional: Our tailored in-person professional learning session is scheduled at a convenient time, excluding July and August. The cost is \$3,000 for a full day.			
License Key: 8941-1979-9682 Start Date: 10/03/2024 End Date: 10/04/2025			
Subtotal (without Sales Tax):			\$5,862.50
+ Sales Tax:			\$0.00
Total:			\$5,862.50

All amounts are in USD.

Step 1: [Submit your purchase order using the link below.](#)

<https://kami.app/form/po-form>

Step 2: [Receive your invoice and license key within 2 business days.](#)

The payment methods below will be provided with your invoice:

1. Our bank account details (ACH payments)
2. Credit card payment option (+3% transaction fee)
3. Paper check mailing address (available to U.S. customers only)

By submitting a purchase order, you are agreeing to the Kami Terms of Service found at kamiapp.com/terms-of-service, the terms and conditions of which are hereby expressly incorporated herein by reference.

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

Request for Taxpayer Identification Number and Certification

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

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
 See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Notable Inc

2 Business name/disregarded entity name, if different from above
Kami

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC

C Corporation

S Corporation

Partnership

Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
8605 Santa Monica Blvd PMB 57387

6 City, state, and ZIP code
West Hollywood, California 90069-4109 US

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

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

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

Social security number

			-		-				
--	--	--	---	--	---	--	--	--	--

or

Employer identification number

3	8	-	3	9	5	2	2	8	6
---	---	---	---	---	---	---	---	---	---

Part II Certification

Under penalties of perjury, I certify that:

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

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

Sign Here Signature of U.S. person ▶  Date ▶ 01/06/2024

General Instructions

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

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

Purpose of Form

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

- Form 1099-INT (interest earned or paid)

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

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

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

Kami Limited

Notable Inc
8605 Santa Monica Blvd, PMB 57387
West Hollywood
California 90069-4109
USA

sales@kamiapp.com

12th June 2023

To whom it may concern,

This letter has been written to confirm that **Kami** is a sole source product. Kami is an application created by Kami Limited (New Zealand). The cloud-based subscription service is exclusively developed, maintained, sold and distributed by Kami Limited and its wholly-owned subsidiary **Notable Inc** in the United States.

Kami Limited maintains all copyright privileges for their products and these products must be purchased directly from the company. There are no licensed agents or dealers authorized to represent these products in the USA. And no division of Kami has any right of sublicense to make a similar or competing product.

Kami is a cloud-based document viewer and annotation tool for browsers. We also provide an extension that can be installed to Chrome browser. Kami for Schools is a version of Kami for educators and students.

Kami Limited warrants that no other items or products are available for purchase that would serve the same purpose or function and there is only one price for the above named product because of exclusive distribution and marketing rights.

If you desire additional information, please contact me at +1 (415) 670 9593 or email sales@kamiapp.com

Sincerely,

A handwritten signature in black ink, appearing to read 'Bob Drummond', with a stylized flourish extending to the right.

Bob Drummond
Exec Chairman

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item:

Date: May 9, 2024

	Business/Financial Services
X	Consent Agenda
	Correspondence/Proposals/Reports
	Curriculum
X	Education/Student Services
	Organizational Structure of the Board
	Personnel Services
	Policy Development
	Public Hearing

Item Requires Board Action: X

Item is for Information Only: _____

Item: Studies Weekly Subscription Renewal

Background: Studies Weekly provides K-6 students with comprehensive social studies and science curriculum. Studies Weekly is aligned to state standards and frameworks. Studies has a fully integrated online learning experience. EACS can manage students’ progress all in one place through Google Classroom. Studies Weekly has students with ready-to-use lessons that incorporate essential learning strategies and activities.

Fiscal Impact: \$8,427.00

Item: Goalbook Subscription Renewal

Background: Goalbook supports special education teachers, school psychologists, and related service providers with designing legally compliant IEP goals and instructional plans for students with diverse needs. All of the content in Goalbook Toolkit is aligned to state standards and research-based frameworks for differentiating instruction, including Universal Design for Learning. Goalbook includes content for Pre-K to Grade 12 in Reading, Writing, Math, and Speech, in addition to Behavior, Social and Emotional Learning, Autism, Occupational Therapy, Alternate Academic and Life Skills, and Transition. It contains strategies and ready to use support that is aligned to the UDL framework to develop scaffolded instruction at mild, moderate and intense levels of support. It also contains tools to help teachers accurately and efficiently track academic and behavioral goals and a library of evidence-based strategies and

resources tailored to individual student needs The SPED department has been using Goalbook to support goal writing and progress monitoring for four school years.

Fiscal Impact: \$10,425.00

Item: Care Solace Renewal Service Renewal

Background: In alignment with our mission and vision, Excel Academy seeks to meet the needs of all students, including the area of social/emotional wellness. Care Solace guides the transition to mental health services by coordinating care for students, staff and their families. The process of hunting down mental health care is daunting and exhausting. The Care Team takes on this burden with their expertise in navigating barriers to accessing mental health care, and is available to serve students, staff, and their families 24/7, in any language. Excel Academy leadership staff has access to a dashboard which will allow the school to track usage, and follow up with families as needed.

Fiscal Impact: \$7,500.00

Item: Presence Learning Agreement Renewal

Background: Presence Learning is a virtual organization that offers assessments and designated instructional services for Special Education students in a unique and effective platform. By using a number of cameras and tools, Presence Learning is able to accurately assess students in order to create reports to inform the student's IEP. Presence Learning has worked directly with assessment publishers to obtain usage rights and copyright permission to use standardized assessments within their independently developed virtual platform and have had independent research studies conducted to ensure the reliability and validity of the assessment administration and results.

Fiscal Impact: \$15,120.00

Item: FlexPoint Education Cloud Renewal

Background: FlexPoint grade level curriculum in all core subjects for students registered in the Virtual Path for 1st-4th grade.

The curriculum provides:

- Quality, standards-aligned content
- Practical and engaging activities, lessons and assessments
- Easy monitoring, grading and feedback
- Video and audio clips embedded in the lessons

The FlexPoint curriculum content provides core curriculum to students enrolled in the Virtual Pathway. The quality, standards-aligned curriculum content especially suits the needs of our remote learning program. Teachers have access to content and slides from which they can create daily lessons for their live classroom. Students who participate in the class lessons can then easily access their assigned work from home. The lesson activities incorporate plenty of printable worksheets, especially in the primary grades, where students need practice with printing, cutting and fine motor skills. The content also seems more engaging and thorough than other online curriculums for elementary students in grades 1-4.

The FlexPoint LMS provides virtual teachers with an easy way to manage the classroom learning. They can easily plan out existing content, add additional lessons and/or assignments, as well as monitor student progress. Students can see how they are doing in their course, with many assignments providing them with immediate feedback. For those assignments graded by the classroom teacher, the system updates the overall grade and completion automatically, so parents can see student progress. Classroom and student specific reports can be printed or saved to assist with school data and weekly communication with parents.

Fiscal Impact: \$19,295.00

Item: IXL Learning Licenses Renewal

Background: IXL is a subscription that provides a comprehensive K-12th curriculum to our Special Education students with over 8,500 skills for all 5 subjects (Match, Science, Language Arts, Social Studies, and Spanish). IXL helps pinpoint where the student succeeds and helps guide to what the next steps would be in their learning path. IXL can recommend skills to work on to fill learning gaps. IXL is trusted by parents and educators, with over 100 billion questions answered and 13 million students use IXL.

It is recommended that that board approve the renewal of the IXL Subscription for a one-year period.

Fiscal Impact: \$8,970.00

Item: Kami Subscription

Background: Kami provides educators with a user-friendly platform for assigning virtual tasks to students, enabling real-time monitoring of student progress and effortless grading and feedback on assignments. For students, this platform offers a paperless way to access coursework, simplifying the completion and submission of tasks, as well as providing instant support from their teachers. The premium version, Kami Pro, offers additional features such as equation tools and image integration in documents, which are not available in the free version. Moreover, educators have the option to seamlessly link Kami with Google Classroom for efficient documentation and organization of student assignments.

Fiscal Impact: \$5,862.50

Item: GoGuardian Renewal

Background: GoGuardian keeps Excel Academy students safe online and helps teachers manage live classes effectively, ensuring a productive virtual learning experience. The system filters out inappropriate content on the internet and flags administrators if concerning searches take place. In a virtual class setting, it allows teachers to refocus students by closing irrelevant tabs, annotating on a student's screen, as well as guiding them towards purposeful content. It is an essential tool for the safety and management of student Chromebooks at Excel Academy.

Fiscal Impact: \$15,076.80

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This Statement of Work ("SOW") is issued pursuant to the terms and conditions of the Terms of Service and Privacy Policy ("Agreement") dated **July 1st, 2024** between **Excel Academy Charter School** ("Subscriber") and the **University of California** ("UC"), collectively referred to as the "PARTIES".

Unless explicitly stated otherwise in this SOW, any capitalized terms shall have the meaning given to them in the SOW. If there are any conflicts between the provisions of this SOW and the Agreement, the terms of this SOW shall control with respect to the subject matter of this SOW. Any provisions of the Agreement not amended by this SOW shall remain in full force and effect. References to the "SOW" shall mean the Agreement and this SOW together.

1. Description of Services

University provides secured technologies and web services for subscribers to manually transfer and UC to accept personal demographic, academic, and other confidential individual record level data necessary to conduct the evaluation by the UC Transcript Evaluation Service ("TES")¹. Through TES, UC evaluates data as a service for participating California public schools and districts to determine student progress toward meeting the eligibility requirements for the California's public systems of higher education. UC will implement a cloud-based data warehouse and visualization solution with data provided by SUBSCRIBER, that they, their designees and other authorized parties can securely access. UC will provide annual regional training and referrals to implementation support services as requested. UC will provide professional services hours as detailed below.

2. Fees, Expenses and Invoicing

The Fee Schedule is set forth in Table 1 below. UC will notify SUBSCRIBER if circumstances arise that would result in additional fees before commencing such work.

SUBSCRIBER agrees to prepay for the products and services listed in table 1, below. UC will invoice SUBSCRIBER in full once the SOW is signed by both parties.

UC will complete the implementation and training work on flat fee basis (see Table 1 for costs). SUBSCRIBER understands that the estimate of time is not a guarantee, and that the estimate is based, in part, upon SUBSCRIBER's availability and requirements outlined at commencement of work. If the total fees and costs exceed the estimated amount, UC will request approval in writing from the SUBSCRIBER. Once approved by SUBSCRIBER, the SUBSCRIBER will also be billed for expenses subject to SUBSCRIBER's customary expense policy.

Upon payment of the annual subscription fee as detailed in Table 1 below, UC will provide the hosting services, web services, and Tableau services needed for SUBSCRIBER staff to access UC TES secured webpage, that include reports, for the length of the subscription period. UC reserves the right to change the pricing model for subsequent years with a 90 day notice to SUBSCRIBER.

In addition to the work specified below, upon request UC will provide referrals to college preparation program support for your implementation and training needs. Programs may assess a fee for providing these services to help offset the costs to deliver these services. These prices are set independent of the TES administration at the UC Office of the President. Schools should inquire with their regional TES school engagement representative to learn more about programs available in your area. SUBSCRIBER

¹ See the list of data collected for the TES evaluation system for each data system and manual upload tool.



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with an active subscription to may submit support requests via email or phone. UC will respond to support requests within one business day.

Schools may also inquire about accessing a direct connection between their school information system and the Transcript Evaluation Service. This preferred message can be automated the collect data at the school's preferred frequency. Schools can request this service through their current information system. The University will consider requests but will not accept any additional costs required for establishing these connections. The University also does not endorse vendors passing the costs of developing the connectors to their current school subscribers.

Table 1. Deliverables and Pricing

Fee	Cost
San Bernardino Regional Initiative	NO Charge

3. Subscriber Uses and Acknowledgement

SUBSCRIBER acknowledges and agrees that UC owns and operates www.transcriptevaluationservice.com, its website, the results of the TES evaluations, and all rights and privileges thereto, and that it will not infringe on any intellectual property rights owned by UC. **Schools and authorized staff at the San Bernardino County Superintendent of Schools are permitted to use TES data provided by the University to institute and assess new and innovative practices to ensure more students are on track to satisfying the “a-g” requirements.** The data from TES is used to provide schools and districts support from University programs, research, and its public service mission focused partners.

4. Assumptions and UC Authorized Access

The following assumptions were taken into account when preparing the SOW and estimate of hours. If any of them turn out not to be accurate, the schedule and/or budget may be affected. UC will work with SUBSCRIBER to resolve any issues as they occur.

- a. SUBSCRIBER agrees to use tes@ucop.edu for support requests.
- b. SUBSCRIBER agrees to provide requisite information for UC to meet Table 1 Deliverables in a timely fashion.
- c. SUBSCRIBER users will log in with email address and their password provided by UC to view reports
- d. SUBSCRIBER will access TES Data Warehouse securely using VPN software provided by UC



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Terms of Service and Privacy Statement

5. Warranties/Indemnification

The University hereby represents and warrants that (a) it will perform the services in a professional and workmanlike manner, and (b) it will only use and the Educational Records in accordance with the terms of this Agreement.

Except as expressly set forth in the agreement, the services, reports, and anything provided in connection with this agreement are provided “as-is”, without any warranties of any kind. The University hereby disclaims all warranties, express or implied, relating to the subject matter hereunder, including without limitation all implied warranties of merchantability, fitness for a particular purpose title and non-infringement.

Accepted and agreed to: Excel Academy Charter School	
Signed:	
Printed:	
Title:	
Date:	

Accepted and agreed to: University of California	
Signed:	<p>DocuSigned by: <i>Richard L. Greene</i> FB2E06D7C2F0467...</p>
Printed:	Richard Greene
Title:	Local Procurement Manager
Date:	1/9/2023

The Family Educational Rights and Privacy Act (FERPA)

This Statement of Rights and Responsibilities derives from and is intended to be consistent with the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99), as well as California Education Code Section 49062 et seq. FERPA is a federal law that protects the privacy of student education records. FERPA applies to all K-12 schools and institutions of higher education that receive funds under an applicable program of the U.S. Department of Education. The California Education Code applies to K-12 schools in California, and similarly protects the privacy of student education records.

FERPA Part 99.31 allows schools to share data collected for this service provided by the University, without prior consent, when the following conditions apply:

- (6)(i) The disclosure is to organizations conducting studies for, or on behalf of, educational agencies or institutions to:
- (A) Develop, validate, or administer predictive tests;
 - (B) Administer student aid programs; or
 - (C) Improve instruction.

The California Education Code permits disclosures for research purposes under the same circumstances. (California Education Code Section 49076 (a)(2)(E)).

Terms of Service Agreement**1. Acknowledgement and consent**

As the representative authorized to procure services for your educational institution(s), you are agreeing to receive no less than 12 months of services as described by the University of California in the Statement of Work (“SOW”), a separate document signed by the authorized party for the school and the University. The date of services shall be marked by either a signed document or electronic request and acknowledgement for services. By acknowledging your approved request to receive services, you are aware that the University accepts the personal demographic, academic, and identifiable data necessary to conduct the evaluation by the University of California’s Transcript Evaluation Service (“TES”)¹. The University evaluates data as a service for participating public schools within California to determine student progress toward meeting the minimum admission requirements of California’s public systems of higher education. Schools are permitted to use data provided by the University to institute and assess new and innovative practices to ensure more students are on track to satisfy the “a-g” requirements. The data from TES are used to provide schools and districts with support from University programs, research and public service mission– focused partners.

- 2. The purpose of TES data collection, evaluation and outcomes reports** University access to records of research is critical for policy analysis and oversight purposes. Examples of how the University may use such records include, but are not

¹ See the list of data collected for the TES evaluation system for each data system and manual upload tool.

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limited to, responding to audits, establishing that past use of University or research sponsor funds was appropriate, responding to government demands or subpoenas, defending research findings, and facilitating research misconduct proceedings. .

The collection and generation of data and tangible research materials are integral parts of any research project. Accurate and appropriately recorded research data, and the creation and retention of tangible research materials, enable scholars to report, replicate and refute research findings, which ultimately advances the research enterprise. As per this document, the evaluation results produced through TES are defined as research data, and the outputs of the service, including reports or other tangible items, including the outcomes of such data, are considered research data and materials. At the subscriber's request, the University is prepared to furnish the basic guidelines taken to ensure that Research Data, as defined below, are appropriately documented, maintained, retained for a reasonable time and accessible to the University for review and use.

- a. "Research Data" are recorded information reflecting original observations and methods related to a research study, and documentation of such data needed to reconstruct and evaluate reported results of the study, regardless of the form or medium on which it may be recorded, that is produced: (i) within a University researcher's course and scope of employment; (ii) using University research facilities or other research resources; or (iii) using funds provided by or through the University. Such data include, but are not limited to, computer software, databases and data of a scientific or technical nature, such as laboratory notebooks, field notes, electronic storage media, and printouts. Research Data also include Tangible Research Material, as defined below. Research Data do not include administrative records incidental to award administration such as financial records, contract and grant records, etc. While such administrative records generated by University researchers are not included in the definition of Research Data under these Guidelines, they are the property of the University and may be subject to terms and conditions of individual sponsored projects, federal and state regulations, and University retention and disposition requirements.²
- b. "Tangible Research Material" is a tangible item produced or collected in the course of research: (i) within a University researcher's course and scope of employment; (ii) using University research facilities or other research resources; or (iii) using funds provided by or through the University.
- c. The University may use data collected from schools to populate the admissions application for the University and its public higher education segment partners, the California State University and California Community Colleges.³ Students will

² Other research data may be obtained through material transfer agreements, license agreements or other means. Such other research data that are not produced or collected by the University may be subject to third-party provider obligations, and should be handled in accordance with contractual commitments.

³ Select the application name for the URL to access list of data elements: [applyUC](#), [CSUMentor](#), and [CCC apply](#).

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have the option to opt in to this automatic population process prior to their data being populated into their in-process application.

3. Data Retention

As a research agent of the state, the University retains information collected and TES outcomes to support research and evaluation to identify trends in student academic performance. Both the University and other local education agencies have responsibilities concerning access to, use of and maintenance of student data used as research data and research materials. These obligations are not new and are not unique to the University; they arise from express provisions in awards and agreements with federal and other research sponsors, overarching regulatory requirements relating to funded research and fundamental precepts of research integrity.

In general, principal investigators should retain all Research Data for as long as possible, but not less than a minimum of six years after final reporting, publication, completion or abandonment of the project, unless a longer retention period is indicated by the funding source or other relevant agreement.⁴

4. Ownership and Use of Research Data

Research Data are the property of University of California Office of the President.⁵ Any research principal investigator, or authorized entity in contract with the University to conduct such research or programs, shall retain original Research Data on behalf of the University. The principal investigator is responsible for ensuring that Research Data, whether generated by the principal investigator or the principal investigator's research team, are recorded, stored and used in accordance with the generally accepted standards of his or her respective discipline and any requirements of applicable federal or state law or regulations, University policies and guidelines, and University contractual commitments.⁶ The principal investigator should consult the appropriate campus or University administrative office regarding the use and stewardship of Research Data that may be subject to applicable export control regulations, laws and regulations protecting the rights and privacy of human subjects, including, but not limited to, the Health Insurance Portability and Accountability Act of 1996 (HIPAA) or other applicable laws and regulations.

Data in its raw form, prior to being uploaded into the University's TES file loader or having been queried or altered by the University's systems or intellectual property, are the property of the school or district, as defined by their local policies. Once data has been accepted into a TES file transfer format and verified for submission to evaluate the

⁴ Contract and Grant Manual, Chapter 17-310: Records Disposition Schedules for Contract and Grant Documents; Administrative Records Relating to Research: Retention Requirements (last updated June 2010).

⁵ [University of California Regulation No. 4](#) (APM-020) provides that original records of the research are the property of the University. ("Original records" may include tangible records of research, such as biological materials, chemical compounds, plants, etc.). California Labor Code § 2860 provides that everything that an employee acquires by virtue of his/her employment (except compensation) belongs to the employer whether acquired during or after the term of employment.

⁶ Contract and Grant Manual, [Chapter 10-330: Principal Investigators](#).

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file and its data contents, such data will become the property of the University and will be subject to the following conditions:

- a. The user will use the student TES evaluation results, provided by the University, only to support and conduct administrative activities, academic advising and counseling, and other intervention strategies intended to improve student progress toward satisfying minimum admission requirements for the California State University (CSU) and University of California systems of higher education.
- b. The data derived from the TES evaluations shall not be used for any purposes that generate revenue from the user or any other party without the express written consent of the University of California.

5. Data Sharing

The University of California supports the sharing of Research Data to advance public knowledge. In the interest of advancing knowledge, the University expects principal investigators to release and share final Research Data, particularly that which is described in a publication, for use by other investigators and researchers in a timely manner, consistent with the practices of the discipline involved. Further, such release and sharing shall be in accordance with existing University policies and guidelines, including those related to intellectual property, sponsor requirements, and applicable laws and regulations, such as laws relating to protecting the rights and privacy of human subjects. The National Institutes of Health policies on data sharing and sharing of biomedical research resources (http://grants.nih.gov/grants/policy/data_sharing/) and the National Science Foundation *Policy on Dissemination and Sharing of Research Results* (<http://www.nsf.gov/bfa/dias/policy/dmp.jsp>) are models that investigators may find useful when planning for the sharing of Research Data. In all instances, principal investigators should consult relevant award and/or agreement terms to determine whether Research Data are subject to any special handling, use or restriction terms.

6. Subscriber Responsibilities and Rights

By subscribing to this service and providing authorized access to your designee and those further provided access based on your or designees' discretion, you agree to hold the data in strict confidence. The user agrees NOT to release data to any other unauthorized person or organization.

The user shall retain data furnished by the school/district and the University in a place physically secure from access by unauthorized persons. Data in electronic format – including, but not limited to, hard drives, CDs or diskettes – shall be stored and processed in such a way that unauthorized persons cannot retrieve the data by means of computer, remote terminal or other means. The user agrees that any computer on which the data reside will be password-protected at all times.

No individual, school and/or district shall be identifiable in any reports, publications or other documents that are created by the user with the use of the data, unless at the specific request of the individual(s) authorized to make a request of this report, which must accompany a signed and notarized letter acknowledging such a request. Results for groups of individuals, schools and/or districts will only be reported when the number (i.e., the "cell size") is ten (10) or greater and in such a manner that results for groups of less than ten (10) cannot be easily calculated from other reported data.

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The user shall adhere to all federal, state and local statutes, regulations and other requirements pertaining to the security, confidentiality and privacy of data including, but not limited to, the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99).

7. University Responsibility and Rights

- a. The Parties intend for the Agreement to be compliant with FERPA and California Education Code without parent consent;
- b. All pupil identifiable information contained in the records shared with the University of California will be kept confidential and will be used for the purpose of improving the District's programs, instruction and academic advising;
- c. Anyone who is provided with access to personally identifiable student education records will be advised of the confidentiality requirements and limitations of use of this Agreement and agree to abide by them;
- d. All student education records and pupil identifiable information contained in those records remain the sole property of the District;
- e. All algorithms, programs, and software used in the TES program, as well as research or analytical materials created by the University, remain the property of the University of California.

At the conclusion of the Agreement or at the District's request, all personally identifiable student education records shared under this Agreement shall be destroyed or returned to the District.

8. Fees and Payment

Certain services carry subscription fees ("Subscription Fees"). Subscription Fees will be due on an annual basis (the "Subscription Term"). Before the beginning of each Subscription Term during the term of this Agreement, the University will invoice you (or, if you've provided a credit card number through Account Administration, will bill that credit card) for the applicable Subscription Fees due for the following Subscription Term. Invoices for Subscription Fees must be paid by the beginning of the Subscription Term or within thirty (30) days after your receipt thereof, whichever is later. Any special arrangements regarding payment will be reflected in a Statement of Work or similar document.

Unless otherwise agreed by you and the University in writing, all fees are non-refundable, including without limitation if this Agreement terminates prior to the end of a Subscription Term for which you have pre-paid Subscription Fees. All amounts due hereunder shall be paid in United States dollars within the United States. Conversion of foreign currency to United States dollars shall be made at the conversion rate existing in the United States (as reported in the Wall Street Journal) on the first working day of the calendar month during which the applicable payment is due.

If the payment information you have provided is incorrect or incomplete, or if you are late paying any invoice or the University is otherwise unable to complete a transaction or collect timely payment due to your error or omission, any payment due hereunder that is so delayed shall bear interest at the rate of one percent (1%) per month or the highest rate allowed by applicable law, whichever is less.

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9. Term and Termination; Suspension

This Agreement shall remain in full force and effect so long as you use the service in strict accordance with the terms, conditions and limitations of this Agreement. Either party may terminate this Agreement for any reason or for no reason upon written notice to the other party (email is sufficient). The University may suspend your access to the services and the performance of any services at any time and without notice if the University reasonably believes in its sole discretion that you have breached any of the terms of this Agreement. If the University terminates this Agreement (except in the event of a breach of the Agreement by you), we will refund to you a prorated portion of your fees based on the date of termination.

Upon termination of this Agreement, your right to use and/or access the services directly related to TES shall terminate, and the University will cease performance of any of these services. The following provisions shall survive termination of this Agreement: Notwithstanding the foregoing, after termination of this Agreement, you may continue to use TES reports that you have downloaded prior to the effective date of termination, solely in accordance with all restrictions herein.

10. Warranties; Warranty Disclaimer

The Family Educational Rights and Privacy Act ("FERPA") and California Education Code Section 49076(a)(1)(A) both generally require that schools get prior written consent from a parent or guardian of a minor student before disclosing any educational records regarding such student ("Educational Records") to third parties. However, education records can be shared with school officials who have a legitimate educational interest. If you are a School, you hereby agree to designate the University (including its employees, contractors and agents) as an "other school official," under FERPA and/or the California Education Code, who has a "legitimate educational interest" in using and accessing such Educational Records. Further, you hereby represent and warrant that (a) you have obtained all consents necessary in connection with disclosing any Educational Records directly or indirectly to the University, Users or otherwise in connection with the Services, and (b) your disclosures described in (a) are not and will not be a violation of FERPA.

The University hereby represents and warrants that (a) it will perform the services in a professional and workmanlike manner, and (b) it will use the Educational Records only in accordance with the terms of this Agreement.

Except as expressly set forth in the agreement, the services, reports and anything provided in connection with this agreement are provided "as-is," without any warranties of any kind. The University hereby disclaims all warranties, express or implied, relating to the subject matter hereunder, including without limitation all implied warranties of merchantability, fitness for a particular purpose title and non-infringement.

11. Limitation of Liability

IN NO EVENT WILL THE UNIVERSITY (OR ITS LICENSORS OR SUPPLIERS) BE LIABLE FOR

- a. ANY INDIRECT, PUNITIVE, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF OR IN ANY WAY CONNECTED WITH THE USE

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OF THE SERVICES, PERFORMANCE OF THE SERVICES OR ANYTHING PROVIDED IN CONNECTION WITH THIS AGREEMENT,

- b. THE DELAY OR INABILITY TO USE THE SERVICES OR ANYTHING PROVIDED IN CONNECTION WITH THIS AGREEMENT OR OTHERWISE ARISING FROM THIS AGREEMENT, INCLUDING WITHOUT LIMITATION LOSS OR CORRUPTION OF DATA, ERROR OR OMISSION IN THE SERVICES, LOSS OF REVENUE OR ANTICIPATED PROFITS OR LOST BUSINESS OR LOST SALES, AND
- c. ANY MATTER BEYOND ITS OR THEIR REASONABLE CONTROL, AND ITS OBLIGATIONS HEREUNDER SHALL BE LIMITED TO THE EXERCISE OF COMMERCIALY REASONABLE EFFORTS; IN EACH CASE, WHETHER BASED IN CONTRACT, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY OR OTHERWISE, EVEN IF THE UNIVERSITY HAS BEEN ADVISED OF THE POSSIBILITY OF DAMAGES.



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Signature Page

This MEMORANDUM OF UNDERSTANDING shall be in effect as of the date first written above, and shall remain in effect for seventeen (12) months from July 1st, 2024 through June 30th, 2025 or until terminated in writing by either party. However, the obligations of confidentiality set forth herein will continue beyond termination.

AGREED: **Excel Academy Charter School**

Signature

Printed Name

Title

Date

AGREED: **THE REGENTS OF THE UNIVERSITY OF CALIFORNIA**

DocuSigned by:
Richard L. Greene

Signature

Richard Greene
Printed Name

Local Procurement Manager
Title

1/9/2023
Date

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This Statement of Work ("SOW") is issued pursuant to the terms and conditions of the Terms of Service and Privacy Policy ("Agreement") dated **July 1st, 2024** between **Excel Academy Charter School – Helendale** ("Subscriber") and the **University of California** ("UC"), collectively referred to as the "PARTIES".

Unless explicitly stated otherwise in this SOW, any capitalized terms shall have the meaning given to them in the SOW. If there are any conflicts between the provisions of this SOW and the Agreement, the terms of this SOW shall control with respect to the subject matter of this SOW. Any provisions of the Agreement not amended by this SOW shall remain in full force and effect. References to the "SOW" shall mean the Agreement and this SOW together.

1. Description of Services

University provides secured technologies and web services for subscribers to manually transfer and UC to accept personal demographic, academic, and other confidential individual record level data necessary to conduct the evaluation by the UC Transcript Evaluation Service ("TES")¹. Through TES, UC evaluates data as a service for participating California public schools and districts to determine student progress toward meeting the eligibility requirements for the California's public systems of higher education. UC will implement a cloud-based data warehouse and visualization solution with data provided by SUBSCRIBER, that they, their designees and other authorized parties can securely access. UC will provide annual regional training and referrals to implementation support services as requested. UC will provide professional services hours as detailed below.

2. Fees, Expenses and Invoicing

The Fee Schedule is set forth in Table 1 below. UC will notify SUBSCRIBER if circumstances arise that would result in additional fees before commencing such work.

SUBSCRIBER agrees to prepay for the products and services listed in table 1, below. UC will invoice SUBSCRIBER in full once the SOW is signed by both parties.

UC will complete the implementation and training work on flat fee basis (see Table 1 for costs). SUBSCRIBER understands that the estimate of time is not a guarantee, and that the estimate is based, in part, upon SUBSCRIBER's availability and requirements outlined at commencement of work. If the total fees and costs exceed the estimated amount, UC will request approval in writing from the SUBSCRIBER. Once approved by SUBSCRIBER, the SUBSCRIBER will also be billed for expenses subject to SUBSCRIBER's customary expense policy.

Upon payment of the annual subscription fee as detailed in Table 1 below, UC will provide the hosting services, web services, and Tableau services needed for SUBSCRIBER staff to access UC TES secured webpage, that include reports, for the length of the subscription period. UC reserves the right to change the pricing model for subsequent years with a 90 day notice to SUBSCRIBER.

In addition to the work specified below, upon request UC will provide referrals to college preparation program support for your implementation and training needs. Programs may assess a fee for providing these services to help offset the costs to deliver these services. These prices are set independent of the TES administration at the UC Office of the President. Schools should inquire with their regional TES school engagement representative to learn more about programs available in your area. SUBSCRIBER

¹ See the list of data collected for the TES evaluation system for each data system and manual upload tool.



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UC-TES School Subscriber Agreement

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with an active subscription to may submit support requests via email or phone. UC will respond to support requests within one business day.

Schools may also inquire about accessing a direct connection between their school information system and the Transcript Evaluation Service. This preferred message can be automated the collect data at the school's preferred frequency. Schools can request this service through their current information system. The University will consider requests but will not accept any additional costs required for establishing these connections. The University also does not endorse vendors passing the costs of developing the connectors to their current school subscribers.

Table 1. Deliverables and Pricing

Fee	Cost
San Bernardino Regional Initiative	NO Charge

3. Subscriber Uses and Acknowledgement

SUBSCRIBER acknowledges and agrees that UC owns and operates www.transcriptevaluationservice.com, its website, the results of the TES evaluations, and all rights and privileges thereto, and that it will not infringe on any intellectual property rights owned by UC. **Schools and authorized staff at the San Bernardino County Superintendent of Schools are permitted to use TES data provided by the University to institute and assess new and innovative practices to ensure more students are on track to satisfying the “a-g” requirements.** The data from TES is used to provide schools and districts support from University programs, research, and its public service mission focused partners.

4. Assumptions and UC Authorized Access

The following assumptions were taken into account when preparing the SOW and estimate of hours. If any of them turn out not to be accurate, the schedule and/or budget may be affected. UC will work with SUBSCRIBER to resolve any issues as they occur.

- a. SUBSCRIBER agrees to use tes@ucop.edu for support requests.
- b. SUBSCRIBER agrees to provide requisite information for UC to meet Table 1 Deliverables in a timely fashion.
- c. SUBSCRIBER users will log in with email address and their password provided by UC to view reports
- d. SUBSCRIBER will access TES Data Warehouse securely using VPN software provided by UC



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Terms of Service and Privacy Statement

5. Warranties/Indemnification

The University hereby represents and warrants that (a) it will perform the services in a professional and workmanlike manner, and (b) it will only use and the Educational Records in accordance with the terms of this Agreement.

Except as expressly set forth in the agreement, the services, reports, and anything provided in connection with this agreement are provided “as-is”, without any warranties of any kind. The University hereby disclaims all warranties, express or implied, relating to the subject matter hereunder, including without limitation all implied warranties of merchantability, fitness for a particular purpose title and non-infringement.

Accepted and agreed to: Excel Academy Charter School – Helendale	
Signed:	
Printed:	
Title:	
Date:	

Accepted and agreed to: University of California	
Signed:	<p>DocuSigned by: <i>Richard L. Greene</i> FB2E06D7C2F0467...</p>
Printed:	Richard Greene
Title:	Local Procurement Manager
Date:	1/9/2023

The Family Educational Rights and Privacy Act (FERPA)

This Statement of Rights and Responsibilities derives from and is intended to be consistent with the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99), as well as California Education Code Section 49062 et seq. FERPA is a federal law that protects the privacy of student education records. FERPA applies to all K-12 schools and institutions of higher education that receive funds under an applicable program of the U.S. Department of Education. The California Education Code applies to K-12 schools in California, and similarly protects the privacy of student education records.

FERPA Part 99.31 allows schools to share data collected for this service provided by the University, without prior consent, when the following conditions apply:

- (6)(i) The disclosure is to organizations conducting studies for, or on behalf of, educational agencies or institutions to:
- (A) Develop, validate, or administer predictive tests;
 - (B) Administer student aid programs; or
 - (C) Improve instruction.

The California Education Code permits disclosures for research purposes under the same circumstances. (California Education Code Section 49076 (a)(2)(E)).

Terms of Service Agreement**1. Acknowledgement and consent**

As the representative authorized to procure services for your educational institution(s), you are agreeing to receive no less than 12 months of services as described by the University of California in the Statement of Work (“SOW”), a separate document signed by the authorized party for the school and the University. The date of services shall be marked by either a signed document or electronic request and acknowledgement for services. By acknowledging your approved request to receive services, you are aware that the University accepts the personal demographic, academic, and identifiable data necessary to conduct the evaluation by the University of California’s Transcript Evaluation Service (“TES”)¹. The University evaluates data as a service for participating public schools within California to determine student progress toward meeting the minimum admission requirements of California’s public systems of higher education. Schools are permitted to use data provided by the University to institute and assess new and innovative practices to ensure more students are on track to satisfy the “a-g” requirements. The data from TES are used to provide schools and districts with support from University programs, research and public service mission– focused partners.

- 2. The purpose of TES data collection, evaluation and outcomes reports** University access to records of research is critical for policy analysis and oversight purposes. Examples of how the University may use such records include, but are not

¹ See the list of data collected for the TES evaluation system for each data system and manual upload tool.

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limited to, responding to audits, establishing that past use of University or research sponsor funds was appropriate, responding to government demands or subpoenas, defending research findings, and facilitating research misconduct proceedings. .

The collection and generation of data and tangible research materials are integral parts of any research project. Accurate and appropriately recorded research data, and the creation and retention of tangible research materials, enable scholars to report, replicate and refute research findings, which ultimately advances the research enterprise. As per this document, the evaluation results produced through TES are defined as research data, and the outputs of the service, including reports or other tangible items, including the outcomes of such data, are considered research data and materials. At the subscriber's request, the University is prepared to furnish the basic guidelines taken to ensure that Research Data, as defined below, are appropriately documented, maintained, retained for a reasonable time and accessible to the University for review and use.

- a. "Research Data" are recorded information reflecting original observations and methods related to a research study, and documentation of such data needed to reconstruct and evaluate reported results of the study, regardless of the form or medium on which it may be recorded, that is produced: (i) within a University researcher's course and scope of employment; (ii) using University research facilities or other research resources; or (iii) using funds provided by or through the University. Such data include, but are not limited to, computer software, databases and data of a scientific or technical nature, such as laboratory notebooks, field notes, electronic storage media, and printouts. Research Data also include Tangible Research Material, as defined below. Research Data do not include administrative records incidental to award administration such as financial records, contract and grant records, etc. While such administrative records generated by University researchers are not included in the definition of Research Data under these Guidelines, they are the property of the University and may be subject to terms and conditions of individual sponsored projects, federal and state regulations, and University retention and disposition requirements.²
- b. "Tangible Research Material" is a tangible item produced or collected in the course of research: (i) within a University researcher's course and scope of employment; (ii) using University research facilities or other research resources; or (iii) using funds provided by or through the University.
- c. The University may use data collected from schools to populate the admissions application for the University and its public higher education segment partners, the California State University and California Community Colleges.³ Students will

² Other research data may be obtained through material transfer agreements, license agreements or other means. Such other research data that are not produced or collected by the University may be subject to third-party provider obligations, and should be handled in accordance with contractual commitments.

³ Select the application name for the URL to access list of data elements: [applyUC](#), [CSUMentor](#), and [CCC apply](#).

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have the option to opt in to this automatic population process prior to their data being populated into their in-process application.

3. Data Retention

As a research agent of the state, the University retains information collected and TES outcomes to support research and evaluation to identify trends in student academic performance. Both the University and other local education agencies have responsibilities concerning access to, use of and maintenance of student data used as research data and research materials. These obligations are not new and are not unique to the University; they arise from express provisions in awards and agreements with federal and other research sponsors, overarching regulatory requirements relating to funded research and fundamental precepts of research integrity.

In general, principal investigators should retain all Research Data for as long as possible, but not less than a minimum of six years after final reporting, publication, completion or abandonment of the project, unless a longer retention period is indicated by the funding source or other relevant agreement.⁴

4. Ownership and Use of Research Data

Research Data are the property of University of California Office of the President.⁵ Any research principal investigator, or authorized entity in contract with the University to conduct such research or programs, shall retain original Research Data on behalf of the University. The principal investigator is responsible for ensuring that Research Data, whether generated by the principal investigator or the principal investigator's research team, are recorded, stored and used in accordance with the generally accepted standards of his or her respective discipline and any requirements of applicable federal or state law or regulations, University policies and guidelines, and University contractual commitments.⁶ The principal investigator should consult the appropriate campus or University administrative office regarding the use and stewardship of Research Data that may be subject to applicable export control regulations, laws and regulations protecting the rights and privacy of human subjects, including, but not limited to, the Health Insurance Portability and Accountability Act of 1996 (HIPAA) or other applicable laws and regulations.

Data in its raw form, prior to being uploaded into the University's TES file loader or having been queried or altered by the University's systems or intellectual property, are the property of the school or district, as defined by their local policies. Once data has been accepted into a TES file transfer format and verified for submission to evaluate the

⁴ Contract and Grant Manual, Chapter 17-310: Records Disposition Schedules for Contract and Grant Documents; Administrative Records Relating to Research: Retention Requirements (last updated June 2010).

⁵ [University of California Regulation No. 4](#) (APM-020) provides that original records of the research are the property of the University. ("Original records" may include tangible records of research, such as biological materials, chemical compounds, plants, etc.). California Labor Code § 2860 provides that everything that an employee acquires by virtue of his/her employment (except compensation) belongs to the employer whether acquired during or after the term of employment.

⁶ Contract and Grant Manual, [Chapter 10-330: Principal Investigators](#).

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file and its data contents, such data will become the property of the University and will be subject to the following conditions:

- a. The user will use the student TES evaluation results, provided by the University, only to support and conduct administrative activities, academic advising and counseling, and other intervention strategies intended to improve student progress toward satisfying minimum admission requirements for the California State University (CSU) and University of California systems of higher education.
- b. The data derived from the TES evaluations shall not be used for any purposes that generate revenue from the user or any other party without the express written consent of the University of California.

5. Data Sharing

The University of California supports the sharing of Research Data to advance public knowledge. In the interest of advancing knowledge, the University expects principal investigators to release and share final Research Data, particularly that which is described in a publication, for use by other investigators and researchers in a timely manner, consistent with the practices of the discipline involved. Further, such release and sharing shall be in accordance with existing University policies and guidelines, including those related to intellectual property, sponsor requirements, and applicable laws and regulations, such as laws relating to protecting the rights and privacy of human subjects. The National Institutes of Health policies on data sharing and sharing of biomedical research resources (http://grants.nih.gov/grants/policy/data_sharing/) and the National Science Foundation *Policy on Dissemination and Sharing of Research Results* (<http://www.nsf.gov/bfa/dias/policy/dmp.jsp>) are models that investigators may find useful when planning for the sharing of Research Data. In all instances, principal investigators should consult relevant award and/or agreement terms to determine whether Research Data are subject to any special handling, use or restriction terms.

6. Subscriber Responsibilities and Rights

By subscribing to this service and providing authorized access to your designee and those further provided access based on your or designees' discretion, you agree to hold the data in strict confidence. The user agrees NOT to release data to any other unauthorized person or organization.

The user shall retain data furnished by the school/district and the University in a place physically secure from access by unauthorized persons. Data in electronic format – including, but not limited to, hard drives, CDs or diskettes – shall be stored and processed in such a way that unauthorized persons cannot retrieve the data by means of computer, remote terminal or other means. The user agrees that any computer on which the data reside will be password-protected at all times.

No individual, school and/or district shall be identifiable in any reports, publications or other documents that are created by the user with the use of the data, unless at the specific request of the individual(s) authorized to make a request of this report, which must accompany a signed and notarized letter acknowledging such a request. Results for groups of individuals, schools and/or districts will only be reported when the number (i.e., the "cell size") is ten (10) or greater and in such a manner that results for groups of less than ten (10) cannot be easily calculated from other reported data.

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The user shall adhere to all federal, state and local statutes, regulations and other requirements pertaining to the security, confidentiality and privacy of data including, but not limited to, the Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99).

7. University Responsibility and Rights

- a. The Parties intend for the Agreement to be compliant with FERPA and California Education Code without parent consent;
- b. All pupil identifiable information contained in the records shared with the University of California will be kept confidential and will be used for the purpose of improving the District's programs, instruction and academic advising;
- c. Anyone who is provided with access to personally identifiable student education records will be advised of the confidentiality requirements and limitations of use of this Agreement and agree to abide by them;
- d. All student education records and pupil identifiable information contained in those records remain the sole property of the District;
- e. All algorithms, programs, and software used in the TES program, as well as research or analytical materials created by the University, remain the property of the University of California.

At the conclusion of the Agreement or at the District's request, all personally identifiable student education records shared under this Agreement shall be destroyed or returned to the District.

8. Fees and Payment

Certain services carry subscription fees ("Subscription Fees"). Subscription Fees will be due on an annual basis (the "Subscription Term"). Before the beginning of each Subscription Term during the term of this Agreement, the University will invoice you (or, if you've provided a credit card number through Account Administration, will bill that credit card) for the applicable Subscription Fees due for the following Subscription Term. Invoices for Subscription Fees must be paid by the beginning of the Subscription Term or within thirty (30) days after your receipt thereof, whichever is later. Any special arrangements regarding payment will be reflected in a Statement of Work or similar document.

Unless otherwise agreed by you and the University in writing, all fees are non-refundable, including without limitation if this Agreement terminates prior to the end of a Subscription Term for which you have pre-paid Subscription Fees. All amounts due hereunder shall be paid in United States dollars within the United States. Conversion of foreign currency to United States dollars shall be made at the conversion rate existing in the United States (as reported in the Wall Street Journal) on the first working day of the calendar month during which the applicable payment is due.

If the payment information you have provided is incorrect or incomplete, or if you are late paying any invoice or the University is otherwise unable to complete a transaction or collect timely payment due to your error or omission, any payment due hereunder that is so delayed shall bear interest at the rate of one percent (1%) per month or the highest rate allowed by applicable law, whichever is less.

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9. Term and Termination; Suspension

This Agreement shall remain in full force and effect so long as you use the service in strict accordance with the terms, conditions and limitations of this Agreement. Either party may terminate this Agreement for any reason or for no reason upon written notice to the other party (email is sufficient). The University may suspend your access to the services and the performance of any services at any time and without notice if the University reasonably believes in its sole discretion that you have breached any of the terms of this Agreement. If the University terminates this Agreement (except in the event of a breach of the Agreement by you), we will refund to you a prorated portion of your fees based on the date of termination.

Upon termination of this Agreement, your right to use and/or access the services directly related to TES shall terminate, and the University will cease performance of any of these services. The following provisions shall survive termination of this Agreement: Notwithstanding the foregoing, after termination of this Agreement, you may continue to use TES reports that you have downloaded prior to the effective date of termination, solely in accordance with all restrictions herein.

10. Warranties; Warranty Disclaimer

The Family Educational Rights and Privacy Act ("FERPA") and California Education Code Section 49076(a)(1)(A) both generally require that schools get prior written consent from a parent or guardian of a minor student before disclosing any educational records regarding such student ("Educational Records") to third parties. However, education records can be shared with school officials who have a legitimate educational interest. If you are a School, you hereby agree to designate the University (including its employees, contractors and agents) as an "other school official," under FERPA and/or the California Education Code, who has a "legitimate educational interest" in using and accessing such Educational Records. Further, you hereby represent and warrant that (a) you have obtained all consents necessary in connection with disclosing any Educational Records directly or indirectly to the University, Users or otherwise in connection with the Services, and (b) your disclosures described in (a) are not and will not be a violation of FERPA.

The University hereby represents and warrants that (a) it will perform the services in a professional and workmanlike manner, and (b) it will use the Educational Records only in accordance with the terms of this Agreement.

Except as expressly set forth in the agreement, the services, reports and anything provided in connection with this agreement are provided "as-is," without any warranties of any kind. The University hereby disclaims all warranties, express or implied, relating to the subject matter hereunder, including without limitation all implied warranties of merchantability, fitness for a particular purpose title and non-infringement.

11. Limitation of Liability

IN NO EVENT WILL THE UNIVERSITY (OR ITS LICENSORS OR SUPPLIERS) BE LIABLE FOR

- a. ANY INDIRECT, PUNITIVE, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF OR IN ANY WAY CONNECTED WITH THE USE

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OF THE SERVICES, PERFORMANCE OF THE SERVICES OR ANYTHING PROVIDED IN CONNECTION WITH THIS AGREEMENT,

- b. THE DELAY OR INABILITY TO USE THE SERVICES OR ANYTHING PROVIDED IN CONNECTION WITH THIS AGREEMENT OR OTHERWISE ARISING FROM THIS AGREEMENT, INCLUDING WITHOUT LIMITATION LOSS OR CORRUPTION OF DATA, ERROR OR OMISSION IN THE SERVICES, LOSS OF REVENUE OR ANTICIPATED PROFITS OR LOST BUSINESS OR LOST SALES, AND
- c. ANY MATTER BEYOND ITS OR THEIR REASONABLE CONTROL, AND ITS OBLIGATIONS HEREUNDER SHALL BE LIMITED TO THE EXERCISE OF COMMERCIALY REASONABLE EFFORTS; IN EACH CASE, WHETHER BASED IN CONTRACT, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY OR OTHERWISE, EVEN IF THE UNIVERSITY HAS BEEN ADVISED OF THE POSSIBILITY OF DAMAGES.



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Signature Page

This MEMORANDUM OF UNDERSTANDING shall be in effect as of the date first written above, and shall remain in effect for seventeen (12) months from July 1st, 2024 through June 30th, 2025 or until terminated in writing by either party. However, the obligations of confidentiality set forth herein will continue beyond termination.

AGREED: **Excel Academy Charter School – Helendale**

Signature

Printed Name

Title

Date

AGREED: **THE REGENTS OF THE UNIVERSITY OF CALIFORNIA**

DocuSigned by:
Richard L. Greene

Signature

Richard Greene
Printed Name

Local Procurement Manager
Title

1/9/2023
Date

Coversheet

Consent - Personnel Services

Section: XI. Consent
Item: C. Consent - Personnel Services
Purpose:
Submitted by:
Related Material: Virtual Teacher Salary Schedule (2).pdf
Job Descriptions for 5.9.24 Board Meeting.pdf



VIRTUAL ADDITIONAL ASSIGNMENT - Excel Teacher Led (ETL) Class Offerings							
AB130							
Virtual Class Stipend	Freq.	Hourly Rate	MAX MONTHLY	Year	Weekly (EST)	Monthly (EST)	Annual (EST)
2 CLASS	per month	\$ 40.63	\$ 325.00	\$ 3,575.00	2	8	88
4 CLASS	per month	\$ 40.63	\$ 650.00	\$ 7,150.00	4	16	176
MIDDLE SCHOOL							
Virtual Class Stipend	Freq.	Hourly Rate	MAX MONTHLY	Year	Weekly (EST)	Monthly (EST)	Annual (EST)
1 CLASS	per month	\$ 40.63	\$ 350.00	\$ 3,850.00	4	16	176
2 CLASS	per month	\$ 40.63	\$ 700.00	\$ 7,700.00	8	32	352
3 CLASS	per month	\$ 40.63	\$ 1,050.00	\$ 11,550.00	12	48	528
4 CLASS	per month	\$ 40.63	\$ 1,400.00	\$ 15,400.00	16	64	704
ETL							
Virtual Class Stipend	Freq.	Hourly Rate	MAX MONTHLY	Year	Weekly (EST)	Monthly (EST)	Annual (EST)
1 CLASS	per month	\$ 40.63	\$ 650.00	\$ 7,150.00	4	16	176
2 CLASS	per month	\$ 40.63	\$ 1,300.00	\$ 14,300.00	8	32	352
3 CLASS	per month	\$ 40.63	\$ 1,950.00	\$ 21,450.00	12	48	528
4 CLASS	per month	\$ 40.63	\$ 2,600.00	\$ 28,600.00	16	64	704



INTERVENTION

Virtual Class Stipend	Freq.	Hourly Rate	MAX MONTHLY	Year	Weekly (EST)	Monthly (EST)	Annual (EST)
1 CLASS Stipend	per month	\$ 40.63	\$ 750.00	\$ 8,250.00	5	20	220
2 CLASS Stipend	per month	\$ 40.63	\$ 1,500.00	\$ 16,500.00	10	40	440
3 CLASS Stipend	per month	\$ 40.63	\$ 2,250.00	\$ 24,750.00	15	60	660
4 CLASS Stipend	per month	\$ 40.63	\$ 3,000.00	\$ 33,000.00	20	80	880

ESSENTIALS

Virtual Class Stipend	Freq.	Hourly Rate	MAX MONTHLY	Year	Weekly (EST)	Monthly (EST)	Annual (EST)
1 CLASS Stipend	per month	\$ 40.63	\$ 1,000.00	\$ 11,000.00	5	20	220
2 CLASS Stipend	per month	\$ 40.63	\$ 2,000.00	\$ 22,000.00	10	40	440
3 CLASS Stipend	per month	\$ 40.63	\$ 3,000.00	\$ 33,000.00	15	60	660
4 CLASS Stipend	per month	\$ 40.63	\$ 4,000.00	\$ 44,000.00	20	80	880



Job Descriptions

5/9/2024

Admin	Classified	Certificated	Stipend
Director of Special Education	Accounts Payable Coordinator	WASC Coordinator	Community Liaison
Special Education Program Specialist	Content & Community Provider Specialist	Community Specialist	
Senior Communications Coordinator	Senior Compliance Coordinator	Virtual Music Teacher	
Assistant Director of Special Education	Community Engagement Coordinator	Elementary Vice Principal	
Director of Operations and Accountability	Special Education Compliance Coordinator	Secondary Vice Principal	
Director of Educational Services		School Counselor	
		Intervention Specialist	
		Assessment and Program Development Coordinator	
		Elementary Counselor	

		School Counselor	

Coversheet

Consent Items - Policy Development

Section: XI. Consent
Item: D. Consent Items - Policy Development
Purpose:
Submitted by:
Related Material: EACS BUS Consent - Board Policies - May.pdf

EXCEL ACADEMY CHARTER SCHOOLS

Agenda Item:

Date: May 9, 2024

	Business/Financial Services
X	Consent Agenda
	Correspondence/Proposals/Reports
	Curriculum
	Education/Student Services
	Organizational Structure of the Board
	Personnel Services
X	Policy Development
	Public Hearing

Item Requires Board Action: X

Item is for Information Only: _____

Item: Approval of existing board policies reviewed and revised by staff for the 2023-2024 school year.

Background:

In order to ensure adherence with State and federal laws, it is recommended the Board approve the following policies as presented.

REVISED

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

3000 Series - Business/Non-Instructional

3000 - EA Fiscal Policy

- Verbiage was made more clear and concise throughout

3005 - EA Fiscal Policy - Purchasing

- Verbiage was made more clear and concise throughout

3011 - EA Fiscal Policy - Accounts Payable and Record Keeping

- Verbiage was made more clear and concise throughout
- Adjusted verbiage to indicate the added responsibilities of the Business Manager

3015 - EA Fiscal Policy - Accounts Receivable

- Verbiage was made more clear and concise throughout

3020 - EA Fiscal Policy - Epsenses

- Verbiage was made more clear and concise throughout

3025 - EA Fiscal Control Policy - Finance and Assets

- Verbiage was made more clear and concise throughout

3100 - EA CCP Code of Conduct

- Verbiage was made more clear and concise throughout

3105 - EA Content & Community Provider Risk Management Policy

- Verbiage was made more clear and concise throughout

3110 - EA Content and Community Provider Application and Pre-Approval

- Verbiage was made more clear and concise throughout
- Excel's Vision was updated

Final Clean Versions of Revised Policies:

[3000](#)

[3005](#)

[3011](#)

[3015](#)

[3020](#)

[3025](#)

[3100](#)

[3105](#)

[3110](#)

Redline Versions of Revised Policies:

[3000](#)

[3005](#)

[3011](#)

[3015](#)

[3020](#)

[3025](#)

[3100](#)

[3105](#)

[3110](#)

Coversheet

Approval of Excel Academy Charter Schools Tax Form 990 Return and California Tax Form 199 Return (Draft) - Year Ended June 30, 2023, as prepared by CliftonLarsonAllen (CLA)

Section: XII. Business/Financial Services
Item: A. Approval of Excel Academy Charter Schools Tax Form 990 Return and California Tax Form 199 Return (Draft) - Year Ended June 30, 2023, as prepared by CliftonLarsonAllen (CLA)
Purpose: Vote
Submitted by:
Related Material: Tax_Return_for_Excel_Academy_Charter_Schools- (1).pdf

BACKGROUND:

The accountancy firm of CliftonLarsonAllen LLP (CLA) prepared the Form 990 Return for the fiscal year ending June 30, 23. The purpose of Form 990 for a nonprofit public charter school is to fulfill the annual reporting requirements set forth by the Internal Revenue Service (IRS) for tax-exempt organizations. Form 990 is a comprehensive information return that provides details about the financial and operational activities of the nonprofit organization, including public charter schools, and is filed with the IRS on an annual basis.

RECOMMENDATION:

It is recommended that the Board of Directors receive the Federal Form 990 and California Form 199 as presented.



Instructions

Included in this DocuSign are the assembled copies of the filings for the organization's records as follows:

1. **Internal Copy:** Includes all letters, instructions, and return pages without any redaction. Please review this file, sign, and date where indicated and submit back to CLA.
2. **Public Inspection Copy:** Redacted to just the information that is required for public inspection. If anyone from the public were to request a copy of the return or if the return were to be posted, the Public Inspection Copy should be used.

Please note:

After the documents have been e-signed and you click 'Finish' - DocuSign will give you the option to log-in - you can log-in at that time and download the executed documents; alternatively, DocuSign will send you another email indicating that the documents have been 'finished' and you can click that link to download and/or print the documents. **Downloading is important as you will not be receiving a paper copy. You have 120 days to download.**

CLA cannot e-file any return until its signed e-file authorization is returned to CLA.

CLA does recommend all returns included in each PDF be signed and dated for your records.

CLA is not making any payments as part of the e-file or submitting any paper returns on your behalf.

Please initial to indicate that you have read and understand the above:

DS
HG

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CliftonLarsonAllen LLP
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EXCEL ACADEMY CHARTER SCHOOLS
FORM 990 INCOME TAX RETURN
FOR YEAR ENDED JUNE 30, 2023



CliftonLarsonAllen LLP
CLAconnect.com

March 22, 2024

Excel Academy Charter Schools
1 Technology Drive, Bldg I 811
Irvine, CA 92618
Attention: Heidi Gasca

Dear Heidi,

Enclosed is the organization's 2022 Exempt Organization return.

Specific filing instructions are as follows.

FORM 990 RETURN:

This return has qualified for electronic filing. After you have reviewed the return for completeness and accuracy, please sign, date and return Form 8879-TE to our office. We will transmit the return electronically to the IRS and no further action is required. Please return Form 8879-TE to us as soon as possible, but no later than by May 15, 2024 the filing deadline.

In addition, tax-exempt organizations must make available for public inspection a copy of their annual returns for the preceding three years and exemption application, if applicable. An organization generally must furnish filings to anyone who requests them in person or in writing. An exempt organization may meet this requirement by posting all the documents on its website or at another organizations site as part of a database of similar materials. Specific requirements must be met to meet this exception.

CALIFORNIA FORM 199 RETURN:

The California Form 199 return has qualified for electronic filing. After you have reviewed your return for completeness and accuracy, please sign, date and return Form 8453-EO to our office. We will then transmit your return to the FTB. Do not mail the paper copy of the return to the FTB.

No payment is required.

A few final reminders relating to your tax return filings:

- There are substantial penalties for failure to properly disclose and report foreign financial accounts and foreign activity. Please make sure you have informed us of any foreign financial accounts or foreign activity so that we have the necessary information to complete any required disclosures or filings.
- Be sure to review the returns prior to signing as you have final responsibility for all information included in the returns. Please contact us if you have any questions or concerns.
- We recommend you keep a paper or electronic copy of your tax returns permanently. Supporting documentation should be kept for a minimum of seven years based on IRS guidance.

CLA exists to create opportunities – for our clients, our people, and our communities. We value our relationship with you and thank you for your trust and confidence in allowing us to serve you. If we can assist you in making strategic, informed decisions in areas of tax or beyond, please contact us as questions arise throughout the year.

Sincerely,

CliftonLarsonAllen LLP

Form **8879-TE**

IRS e-file Signature Authorization for a Tax Exempt Entity

OMB No. 1545-0047

For calendar year 2022, or fiscal year beginning JUL 1, 2022, and ending JUN 30, 2023

2022

Department of the Treasury
Internal Revenue Service

Do not send to the IRS. Keep for your records.
Go to www.irs.gov/Form8879TE for the latest information.

Name of filer

EXCEL ACADEMY CHARTER SCHOOLS

EIN or SSN

47-4121751

Name and title of officer or person subject to tax

**HEIDI GASCA
EXECUTIVE DIRECTOR**

Part I Type of Return and Return Information

Check the box for the return for which you are using this Form 8879-TE and enter the applicable amount, if any, from the return. Form 8038-CP and Form 5330 filers may enter dollars and cents. For all other forms, enter whole dollars only. If you check the box on line 1a, 2a, 3a, 4a, 5a, 6a, 7a, 8a, 9a, or 10a below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, 5b, 6b, 7b, 8b, 9b, or 10b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not complete more than one line in Part I.**

1a Form 990 check here	<input checked="" type="checkbox"/>	b Total revenue , if any (Form 990, Part VIII, column (A), line 12)	1b <u>20,943,400.</u>
2a Form 990-EZ check here	<input type="checkbox"/>	b Total revenue , if any (Form 990-EZ, line 9)	2b _____
3a Form 1120-POL check here	<input type="checkbox"/>	b Total tax (Form 1120-POL, line 22)	3b _____
4a Form 990-PF check here	<input type="checkbox"/>	b Tax based on investment income (Form 990-PF, Part V, line 5)	4b _____
5a Form 8868 check here	<input type="checkbox"/>	b Balance due (Form 8868, line 3c)	5b _____
6a Form 990-T check here	<input type="checkbox"/>	b Total tax (Form 990-T, Part III, line 4)	6b _____
7a Form 4720 check here	<input type="checkbox"/>	b Total tax (Form 4720, Part III, line 1)	7b _____
8a Form 5227 check here	<input type="checkbox"/>	b FMV of assets at end of tax year (Form 5227, Item D)	8b _____
9a Form 5330 check here	<input type="checkbox"/>	b Tax due (Form 5330, Part II, line 19)	9b _____
10a Form 8038-CP check here	<input type="checkbox"/>	b Amount of credit payment requested (Form 8038-CP, Part III, line 22)	10b _____

Part II Declaration and Signature Authorization of Officer or Person Subject to Tax

Under penalties of perjury, I declare that I am an officer of the above entity or I am a person subject to tax with respect to (name of entity) _____, (EIN) _____ and that I have examined a copy of the 2022 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

PIN: check one box only

I authorize CLIFTONLARSONALLEN LLP to enter my PIN 22100
ERO firm name Enter five numbers, but do not enter all zeros

as my signature on the tax year 2022 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer or person subject to tax with respect to the entity, I will enter my PIN as my signature on the tax year 2022 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax

Heidi Gasca

Date 3/24/2024

Part III Certification and Authentication

ERO's EFIN/PIN. Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

95405291740

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2022 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature

MEI-LI HUANG

Date

03/22/24

ERO Must Retain This Form - See Instructions

Do Not Submit This Form to the IRS Unless Requested To Do So

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8879-TE** (2022)

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

2022

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

A For the **2022** calendar year, or tax year beginning **JUL 1, 2022** and ending **JUN 30, 2023**

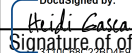
B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization EXCEL ACADEMY CHARTER SCHOOLS Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite 1 TECHNOLOGY DRIVE, BLDG I 811 City or town, state or province, country, and ZIP or foreign postal code IRVINE, CA 92618 F Name and address of principal officer: HEIDI GASCA SAME AS C ABOVE	D Employer identification number 47-4121751 E Telephone number 949-387-7822 G Gross receipts \$ 20,943,400. H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions H(c) Group exemption number
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
J Website: WWW.EXCELACADEMY.EDUCATION		
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		L Year of formation: 2015 M State of legal domicile: CA

Part I Summary

	1	Briefly describe the organization's mission or most significant activities: THE CORPORATION OPERATES TUITION FREE CHARTER SCHOOL PROGRAMS WHERE TEACHERS AND PARENTS PARTNER		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
Activities & Governance	3	Number of voting members of the governing body (Part VI, line 1a)	3	5
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	5
	5	Total number of individuals employed in calendar year 2022 (Part V, line 2a)	5	144
	6	Total number of volunteers (estimate if necessary)	6	0
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
	7b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.
	Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year 22,687,187.
9		Program service revenue (Part VIII, line 2g)	0.	0.
10		Investment income (Part VIII, column (A), lines 3, 4, and 7d)	7,844.	79,742.
11		Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	226,907.	11,204.
12		Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	22,921,938.	20,943,400.
Expenses		13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	11,875,032.	12,873,259.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b	Total fundraising expenses (Part IX, column (D), line 25)	0.	
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	7,391,350.	6,023,579.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	19,266,382.	18,896,838.
	19	Revenue less expenses. Subtract line 18 from line 12	3,655,556.	2,046,562.
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year 6,603,445.	End of Year 9,975,217.
	21	Total liabilities (Part X, line 26)	1,842,709.	3,167,919.
	22	Net assets or fund balances. Subtract line 21 from line 20	4,760,736.	6,807,298.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	DocuSigned by:  Signature of officer	3/24/2024 Date			
Paid Preparer Use Only	Print/Type preparer's name MEI-LI HUANG	Preparer's signature MEI-LI HUANG	Date 03/22/24	Check if self-employed <input type="checkbox"/>	PTIN P02383735
	Firm's name CLIFTONLARSONALLEN LLP	Firm's EIN 41-0746749		Phone no. (626) 857-7300	
	Firm's address 2210 EAST ROUTE 66 GLENDORA, CA 91740				

May the IRS discuss this return with the preparer shown above? See instructions Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission: PROVIDES A 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

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [] Yes [X] No If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 16,666,253. including grants of \$) (Revenue \$) OFFERING AN INDEPENDENT STUDY PERSONALIZED LEARNING MODEL FOR STUDENTS IN GRADES TK-12. ALLOWING PARENTS TO SELECT A WIDE VARIETY OF EDUCATIONAL RESOURCES AND MATERIALS FROM APPROVED CONTENT AND COMMUNITY PROVIDERS USING STATE INSTRUCTIONAL FUND. THE ORGANIZATION SERVED APPROXIMATELY 1,590 STUDENTS.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 16,666,253.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>		X
b Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>		X
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	X	
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I.</i> See instructions		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	X	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		X
26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>		X
b A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>		X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?	X	

Note: All Form 990 filers are required to complete Schedule O

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable		
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
	2a		144
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b	If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation on Schedule O</i>		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b	If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d	If "Yes," indicate the number of Forms 8282 filed during the year		7d
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?		X
b	If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation on Schedule O</i>		
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.		X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.		X
17	Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.		

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
1b	Enter the number of voting members included on line 1a, above, who are independent		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Did the organization have members or stockholders?		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
7b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
8a	The governing body?	X	
8b	Each committee with authority to act on behalf of the governing body?		X
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Did the organization have local chapters, branches, or affiliates?		X
10b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	X	
11b	Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
12b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	X	
13	Did the organization have a written whistleblower policy?	X	
14	Did the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
15a	The organization's CEO, Executive Director, or top management official	X	
15b	Other officers or key employees of the organization	X	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
16b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed CA
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records
JOE SORRERA - (949) 387-7822
1 TECHNOLOGY DRIVE I-811, IRVINE, CA 92816

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
 - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
 - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
 - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) HEIDI GASCA EXECUTIVE DIRECTOR	40.00			X			192,145.	0.	38,504.	
(2) KERI SCHNEEWEISS DIRECTOR OF OPERATIONS	40.00				X		152,640.	0.	44,562.	
(3) LARA C ULMER ASSIST DIR OF SPED	40.00				X		149,961.	0.	46,813.	
(4) LEAH VIDES SPECIAL EDUCATION PROGRAM SPECIALIST	40.00				X		118,898.	0.	41,023.	
(5) JENNIFER CRAIG ASSIST DIR OF ASSESSMENT	40.00				X		126,234.	0.	0.	
(6) LORRIE M WOOD ASSISTANT PRINCIPAL	40.00				X		108,618.	0.	36,208.	
(7) LARRY ALVARADO MEMBER	2.00	X					12,525.	0.	0.	
(8) DR WILLIAM HALL PRESIDENT	5.00	X		X			12,450.	0.	0.	
(9) MICHAEL HUMPHREY VICE PRESIDENT	2.00	X		X			7,537.	0.	0.	
(10) STEVE FRAIRE CLERK	2.00	X		X			7,500.	0.	0.	
(11) SUSAN HOULE MEMBER	2.00	X					7,500.	0.	0.	

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
1b Subtotal							896,008.	0.	207,110.	
c Total from continuation sheets to Part VII, Section A							0.	0.	0.	
d Total (add lines 1b and 1c)							896,008.	0.	207,110.	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 9

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

			(A)	(B)	(C)	(D)	
			Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a	Federated campaigns	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c				
	d	Related organizations	1d				
	e	Government grants (contributions)	1e	20,852,454.			
	f	All other contributions, gifts, grants, and similar amounts not included above ...	1f				
	g	Noncash contributions included in lines 1a-1f	1g	\$			
	h	Total. Add lines 1a-1f		20,852,454.			
Program Service Revenue	2 a	_____	Business Code				
	b	_____					
	c	_____					
	d	_____					
	e	_____					
	f	All other program service revenue					
	g	Total. Add lines 2a-2f					
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)		79,742.		79,742.	
	4	Income from investment of tax-exempt bond proceeds					
	5	Royalties					
	6 a	Gross rents	6a	(i) Real			
				(ii) Personal			
	b	Less: rental expenses ...	6b				
	c	Rental income or (loss)	6c				
	d	Net rental income or (loss)					
	7 a	Gross amount from sales of assets other than inventory	7a	(i) Securities			
				(ii) Other			
	b	Less: cost or other basis and sales expenses	7b				
	c	Gain or (loss)	7c				
d	Net gain or (loss)						
8 a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	8a					
b	Less: direct expenses	8b					
c	Net income or (loss) from fundraising events						
9 a	Gross income from gaming activities. See Part IV, line 19	9a					
b	Less: direct expenses	9b					
c	Net income or (loss) from gaming activities						
10 a	Gross sales of inventory, less returns and allowances	10a					
b	Less: cost of goods sold	10b					
c	Net income or (loss) from sales of inventory						
Miscellaneous Revenue	11 a	OTHER REVENUE	Business Code	611600	11,204.	11,204.	
	b	_____					
	c	_____					
	d	All other revenue					
	e	Total. Add lines 11a-11d			11,204.		
12	Total revenue. See instructions			20,943,400.	0.	0.	
						90,946.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	271,090.	271,090.		
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	9,605,731.	8,709,203.	896,528.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	1,522,875.	1,497,876.	24,999.	
9 Other employee benefits	1,244,156.	1,060,739.	183,417.	
10 Payroll taxes	229,407.	171,518.	57,889.	
11 Fees for services (nonemployees):				
a Management	355,664.	355,664.		
b Legal	301,880.	301,880.		
c Accounting	30,897.	30,897.		
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	2,443,665.	1,646,364.	797,301.	
12 Advertising and promotion	16,727.	16,727.		
13 Office expenses	60,184.	60,184.		
14 Information technology	306,175.	306,175.		
15 Royalties				
16 Occupancy	96,100.	14,480.	81,620.	
17 Travel	120,970.	73,230.	47,740.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
19 Conferences, conventions, and meetings				
20 Interest	59,610.	59,610.		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance	70,808.	10,883.	59,925.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a <u>INSTRUCTIONAL MATERIALS</u>	1,804,177.	1,786,160.	18,017.	
b <u>OTHER EXPENSES</u>	356,722.	293,573.	63,149.	
c				
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	18,896,838.	16,666,253.	2,230,585.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	3,035,209.	1	2,963,183.
	2 Savings and temporary cash investments	1,494,664.	2	4,676,195.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	2,033,088.	4	2,060,622.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	40,484.	9	152,190.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a		
	b Less: accumulated depreciation	10b	10c	
	11 Investments - publicly traded securities		11	
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	0.	15	123,027.
16 Total assets. Add lines 1 through 15 (must equal line 33)	6,603,445.	16	9,975,217.	
Liabilities	17 Accounts payable and accrued expenses	398,029.	17	1,125,562.
	18 Grants payable		18	
	19 Deferred revenue	195,912.	19	1,854,456.
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties	1,248,768.	24	62,494.
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	0.	25	125,407.
	26 Total liabilities. Add lines 17 through 25	1,842,709.	26	3,167,919.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	4,760,736.	27	6,807,298.
	28 Net assets with donor restrictions		28	
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	4,760,736.	32	6,807,298.
	33 Total liabilities and net assets/fund balances	6,603,445.	33	9,975,217.

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	20,943,400.
2	Total expenses (must equal Part IX, column (A), line 25)	2	18,896,838.
3	Revenue less expenses. Subtract line 2 from line 1	3	2,046,562.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	4,760,736.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	6,807,298.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		X
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2b	Were the organization's financial statements audited by an independent accountant?	X	
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:			
<input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	X	
3b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits	X	

Form 990 (2022)

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization EXCEL ACADEMY CHARTER SCHOOLS	Employer identification number 47-4121751
---	--

Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge ...						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources ...						
9 Net income from unrelated business activities, whether or not the business is regularly carried on ...						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f))	14	%
15 Public support percentage from 2021 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2022. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 33 1/3% support test - 2021. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2022. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 10% -facts-and-circumstances test - 2021. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions		<input type="checkbox"/>

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge ...						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources ...						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2021 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2021 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2022. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

b 33 1/3% support tests - 2021. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
b A family member of a person described on line 11a above?		
c A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
2 Activities Test. Answer lines 2a and 2b below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>	Yes	No
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
3 Parent of Supported Organizations. Answer lines 3a and 3b below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No" provide details in Part VI.</i>		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). See instructions.
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2022 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2022	(iii) Distributable Amount for 2022
1	Distributable amount for 2022 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2022 (reasonable cause required - explain in Part VI). See instructions.		
3	Excess distributions carryover, if any, to 2022		
a	From 2017		
b	From 2018		
c	From 2019		
d	From 2020		
e	From 2021		
f	Total of lines 3a through 3e		
g	Applied to underdistributions of prior years		
h	Applied to 2022 distributable amount		
i	Carryover from 2017 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2022 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2022 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.		
6	Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.		
7	Excess distributions carryover to 2023. Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2018		
b	Excess from 2019		
c	Excess from 2020		
d	Excess from 2021		
e	Excess from 2022		

Schedule A (Form 990) 2022

Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.
(See instructions.)

Multiple horizontal lines for supplemental information input.

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization: EXCEL ACADEMY CHARTER SCHOOLS; Employer identification number: 47-4121751

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two Yes/No questions regarding donor property and grant fund usage.

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include purpose(s) of conservation easements, a table for lines 2a-2d (Total number, acreage, certified historic structures, acquired after 2006), and questions about monitoring, expenses, and reporting requirements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include questions about reporting art and historical treasures, and a table for revenue and assets included in Form 990.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2022

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
- a Public exhibition
 - b Scholarly research
 - c Preservation for future generations
 - d Loan or exchange program
 - e Other _____
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|---------------------------------|--------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment _____%
 - b Permanent endowment _____%
 - c Term endowment _____%
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- | | Yes | No |
|---|--------|----|
| (i) Unrelated organizations | 3a(i) | |
| (ii) Related organizations | 3a(ii) | |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? <input type="checkbox"/> | 3b | |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) 0.

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) LEASE LIABILITY	125,407.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ...

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	20,943,400.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	0.
3	Subtract line 2e from line 1	3	20,943,400.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	20,943,400.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	18,896,838.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	0.
3	Subtract line 2e from line 1	3	18,896,838.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	18,896,838.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART X, LINE 2:

THE SCHOOL IS PART OF A NONPROFIT CORPORATION EXEMPT FROM THE PAYMENT OF INCOME TAXES UNDER INTERNAL REVENUE CODE SECTION 501(C)(3) AND CALIFORNIA REVENUE AND TAXATION CODE SECTION 23701D. ACCORDINGLY, NO PROVISION HAS BEEN MADE FOR INCOME TAXES. MANAGEMENT HAS DETERMINED THAT ALL INCOME TAX POSITIONS ARE MORE LIKELY THAN NOT OF BEING SUSTAINED UPON POTENTIAL AUDIT OR EXAMINATION; THEREFORE, NO DISCLOSURES OF UNCERTAIN INCOME TAX POSITIONS ARE REQUIRED. THE SCHOOL IS SUBJECT TO INCOME TAX ON NET INCOME THAT IS DERIVED FROM BUSINESS ACTIVITIES THAT ARE UNRELATED TO THE EXEMPT PURPOSES. THE SCHOOL FILES AND EXEMPT SCHOOL RETURN AND APPLICABLE UNRELATED BUSINESS INCOME TAX RETURN IN THE U.S. FEDERAL JURISDICTION AND WITH THE CALIFORNIA FRANCHISE TAX BOARD.

SCHEDULE E
(Form 990)

Schools

OMB No. 1545-0047

Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.

2022

Department of the Treasury
Internal Revenue Service

Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for the latest information.

Open to Public Inspection

Name of the organization

EXCEL ACADEMY CHARTER SCHOOLS

Employer identification number

47-4121751

Part I

	YES	NO
1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	X	
2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	X	
3 Has the organization publicized its racially nondiscriminatory policy on its primary publicly accessible Internet homepage at all times during its tax year in a manner reasonably expected to be noticed by visitors to the homepage, or through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II	X	
THE SCHOOL PUBLICIZES ITS POLICY IN ITS REGISTRATION MATERIALS AND DOCUMENTS USED TO SOLICIT STUDENTS AND ON THE SCHOOL'S WEBSITE AT HTTPS://EXCELACADEMY.EDUCATION/RESOURCES/2021-2022-HANDBOOK.		
4 Does the organization maintain the following?		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	X	
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? ..	X	
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	X	
d Copies of all material used by the organization or on its behalf to solicit contributions?	X	
If you answered "No" to any of the above, please explain. If you need more space, use Part II.		
5 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?		X
b Admissions policies?		X
c Employment of faculty or administrative staff?		X
d Scholarships or other financial assistance?		X
e Educational policies?		X
f Use of facilities?		X
g Athletic programs?		X
h Other extracurricular activities?		X
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
6a Does the organization receive any financial aid or assistance from a governmental agency?	X	
b Has the organization's right to such aid ever been revoked or suspended?		X
If you answered "Yes" on either line 6a or line 6b, explain on Part II.		
7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, as modified by Rev. Proc. 2019-22, 2019-22 I.R.B. 1260, covering racial nondiscrimination? If "No," explain on Part II	X	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule E (Form 990) 2022

Part II **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information. See instructions.

LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:

THE SCHOOL IS A PUBLIC CHARTER SCHOOL PRINCIPALLY FUNDED BY CALIFORNIA AND FEDERAL MONIES RECEIVED THROUGH THE CALIFORNIA DEPARTMENT OF EDUCATION.

Multiple horizontal lines for supplemental information.

**SCHEDULE J
(Form 990)**

Compensation Information

OMB No. 1545-0047

2022

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
 Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
 Attach to Form 990.
 Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

Name of the organization

EXCEL ACADEMY CHARTER SCHOOLS

Employer identification number

47-4121751

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- | | |
|--|--|
| <input type="checkbox"/> First-class or charter travel | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees |
| <input type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

3 Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- | | |
|--|---|
| <input type="checkbox"/> Compensation committee | <input checked="" type="checkbox"/> Written employment contract |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study |
| <input type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment? **4a**
- b** Participate in or receive payment from a supplemental nonqualified retirement plan? **4b**
- c** Participate in or receive payment from an equity-based compensation arrangement? **4c**
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? **5a**
- b** Any related organization? **5b**
- If "Yes" on line 5a or 5b, describe in Part III.

6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? **6a**
- b** Any related organization? **6b**
- If "Yes" on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
1b		
2		
4a		X
4b		X
4c		X
5a		X
5b		X
6a		X
6b		X
7		X
8		X
9		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2022

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) HEIDI GASCA EXECUTIVE DIRECTOR	(i)	192,145.	0.	0.	38,504.	0.	230,649.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) KERI SCHNEEWEISS DIRECTOR OF OPERATIONS	(i)	152,640.	0.	0.	31,119.	13,443.	197,202.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) LARA C ULMER ASSIST DIR OF SPED	(i)	149,961.	0.	0.	30,997.	15,816.	196,774.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) LEAH VIDES SPECIAL EDUCATION PROGRAM SPECIALIST	(i)	118,898.	0.	0.	25,623.	15,400.	159,921.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 3:

THE OFFICERS' AND KEY EMPLOYEES' PAY IS DETERMINE BASED ON DATA PROVIDED BY EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS. THE BOARD MUST VOTE TO APPROVE THE OFFICERS' AND KEY EMPLOYEES' COMPENSATION AS A DIRECT ACTION.

**SCHEDULE O
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

Name of the organization

EXCEL ACADEMY CHARTER SCHOOLS

Employer identification number

47-4121751

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

TOGETHER.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

STUDENTS CREATING THE NEXT GENERATION OF LEADERS.

FORM 990, PART VI, SECTION A, LINE 8B:

THERE ARE NO COMMITTEES THAT CAN ACT ON BEHALF OF THE BOARD.

FORM 990, PART VI, SECTION B, LINE 11B:

THE FORM 990 IS PREPARED BY THE ORGANIZATION'S OUTSIDE PUBLIC ACCOUNTING
FIRM BASED ON INFORMATION PROVIDED BY MANAGEMENT. ONCE A DRAFT OF THE
RETURN IS AVAILABLE, IT IS REVIEWED BY MANAGEMENT WITH ANY CHANGES OR
REVISIONS INCORPORATED INTO THE FILING. THE REVISED RETURN IS THEN
SUBMITTED TO THE BOARD OF DIRECTORS FOR THEIR REVIEW AND APPROVAL PRIOR TO
SUBMITTING TO THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

MONITORING IS PERFORMED REGULARLY BY THE OFFICERS TO IDENTIFY POTENTIAL
CONFLICTS OF INTEREST. ANY QUESTION OF A CONFLICT IS ADDRESSED WITH THE
INTERESTED PERSON, WHO IS REQUIRED TO DISCLOSE THE EXISTENCE OF ANY
FINANCIAL INTEREST AND BE AFFORDED THE OPPORTUNITY TO DISCLOSE ALL MATERIAL
FACTS TO THE BOARD AND EXECUTIVE DIRECTOR. IF A CONFLICT OF INTEREST IS
IDENTIFIED, THE APPROPRIATE ACTION IS TAKEN, INCLUDING LIMITATIONS TO THE
INDIVIDUAL'S INFLUENCE ON RELATED BUSINESS MATTERS.

Schedule O (Form 990) 2022

Page 2

Name of the organization EXCEL ACADEMY CHARTER SCHOOLS	Employer identification number 47-4121751
--	---

FORM 990, PART VI, SECTION B, LINE 15:

THE EXECUTIVE DIRECTOR'S PAY IS DETERMINED BASED ON DATA PROVIDED BY EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS. THE BOARD MUST VOTE TO APPROVE THE EXECUTIVE DIRECTOR'S COMPENSATION AS A DIRECT ACTION. THE OFFICERS' AND KEY EMPLOYEES' PAY IS DETERMINE BASED ON DATA PROVIDED BY EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS. THE BOARD MUST VOTE TO APPROVE THE OFFICERS' AND KEY EMPLOYEES' COMPENSATION AS A DIRECT ACTION.

THE PROCESS DESCRIBED HERE WAS LAST COMPLETED IN 2023.

FORM 990, PART VI, SECTION C, LINE 19:

THE DOCUMENTS ARE READILY AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IX, LINE 11G, OTHER FEES:**SPED CONSULTANTS :**

PROGRAM SERVICE EXPENSES	327,257.
MANAGEMENT AND GENERAL EXPENSES	14,700.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	341,957.

PROFESSIONAL SERVICES - NON-INSTRUCTIONALS:

PROGRAM SERVICE EXPENSES	0.
MANAGEMENT AND GENERAL EXPENSES	137,008.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	137,008.

INSTRUCTIONAL VENDOR AND CONSULTANTS:

232212 10-28-22

Schedule O (Form 990) 2022

Name of the organization EXCEL ACADEMY CHARTER SCHOOLS	Employer identification number 47-4121751
--	---

PROGRAM SERVICE EXPENSES	1,319,107.
MANAGEMENT AND GENERAL EXPENSES	621,671.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	1,940,778.

MISC. OTHER OUTSIDE SERVICES:

PROGRAM SERVICE EXPENSES	0.
MANAGEMENT AND GENERAL EXPENSES	23,922.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	23,922.

TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A **2,443,665.**

FORM 990, PART XII, LINE 2C:

THE PROCESS DID NOT CHANGE FROM PRIOR YEAR.

TAXABLE YEAR
2022

California Exempt Organization Annual Information Return

228941 01-10-23
FORM

199

Calendar Year 2022 or fiscal year beginning (mm/dd/yyyy) **07/01/2022**, and ending (mm/dd/yyyy) **06/30/2023**

Corporation/Organization name **EXCEL ACADEMY CHARTER SCHOOLS** California corporation number **3787590**

Additional information. See instructions. FEIN **47-4121751**

Street address (suite or room) **1 TECHNOLOGY DRIVE, BLDG I, NO. 811** PMB no.

City **IRVINE** State **CA** ZIP code **92618**

Foreign country name Foreign province/state/county Foreign postal code

A First return Yes No
B Amended return Yes No
C IRC Section 4947(a)(1) trust Yes No
D Final information return?
 Dissolved Surrendered (Withdrawn) Merged/Reorganized
 Enter date: (mm/dd/yyyy) _____
E Check accounting method: (1) Cash (2) Accrual (3) Other
F Federal return filed? (1) 990T (2) 990PF (3) Sch H (990) (4) Other 990 series
G Is this a group filing? See instructions Yes No
H Is this organization in a group exemption Yes No
 If "Yes," what is the parent's name? _____
I Did the organization have any changes to its guidelines not reported to the FTB? See instructions Yes No
J If exempt under R&TC Section 23701d, has the organization engaged in political activities? See instructions. Yes No
K Is the organization exempt under R&TC Section 23701g? Yes No
 If "Yes," enter the gross receipts from nonmember sources \$ _____
L Is the organization a limited liability company? Yes No
M Did the organization file Form 100 or Form 109 to report taxable income? Yes No
N Is the organization under audit by the IRS or has the IRS audited in a prior year? Yes No
O Is federal Form 1023/1024 pending? Yes No
 Date filed with IRS _____

Part I Complete Part I unless not required to file this form. See General Information B and C.

Receipts and Revenues	1	Gross sales or receipts from other sources. From Side 2, Part II, line 8	1	90,946	00
	2	Gross dues and assessments from members and affiliates	2		00
	3	Gross contributions, gifts, grants, and similar amounts received	3	20,852,454	00
	4	Total gross receipts for filing requirement test. Add line 1 through line 3. This line must be completed. If the result is less than \$50,000, see General Information B	4	20,943,400	00
	5	Cost of goods sold	5		00
	6	Cost or other basis, and sales expenses of assets sold	6		00
	7	Total costs. Add line 5 and line 6	7		00
	8	Total gross income. Subtract line 7 from line 4	8	20,943,400	00
Expenses	9	Total expenses and disbursements. From Side 2, Part II, line 18	9	18,896,838	00
	10	Excess of receipts over expenses and disbursements. Subtract line 9 from line 8	10	2,046,562	00
Filing Fee	11	Total payments	11		00
	12	Use tax. See General Information K	12		00
	13	Payments balance. If line 11 is more than line 12, subtract line 12 from line 11	13		00
	14	Use tax balance. If line 12 is more than line 11, subtract line 11 from line 12	14		00
	15	Penalties and interest. See General Information J	15		00
	16	Balance due. Add line 12 and line 15. Then subtract line 11 from the result	16		00

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Sign Here
Signature of officer: *Audi Gasca* Title: **EXECUTIVE DIRE** Date: **3/24/2024** Telephone: **760-494-9646**

Preparer's signature: **MEI-LI HUANG** Date: **03/22/24** Check if self-employed: PTIN: **P02383735**

Paid Preparer's Use Only
Firm's name (or yours, if self-employed) and address: **CLIFTONLARSONALLEN LLP**
2210 EAST ROUTE 66
GLEN DORA, CA 91740
Telephone: **(626) 857-7300**

May the FTB discuss this return with the preparer shown above? See instructions Yes No

EXCEL ACADEMY CHARTER SCHOOLS

47-4121751

Part II Organizations with gross receipts of more than \$50,000 and private foundations regardless of amount of gross receipts - complete Part II or furnish substitute information.

228951 01-10-23

Receipts from Other Sources	1	Gross sales or receipts from all business activities. See instructions	•	1		00	
	2	Interest	•	2	79,742	00	
	3	Dividends	•	3		00	
	4	Gross rents	•	4		00	
	5	Gross royalties	•	5		00	
	6	Gross amount received from sale of assets (See instructions)	•	6		00	
	7	Other income SEE STATEMENT 1	•	7	11,204	00	
	8	Total gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1	•	8	90,946	00	
	9	Contributions, gifts, grants, and similar amounts paid	•	9		00	
	10	Disbursements to or for members	•	10		00	
	11	Compensation of officers, directors, and trustees SEE STATEMENT 2	•	11	271,090	00	
	12	Other salaries and wages	•	12	9,605,731	00	
	Expenses and Disbursements	13	Interest	•	13	59,610	00
		14	Taxes	•	14	229,407	00
		15	Rents	•	15	96,100	00
		16	Depreciation and depletion (See instructions)	•	16		00
		17	Other expenses and disbursements SEE STATEMENT 3	•	17	8,634,900	00
		18	Total expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9	•	18	18,896,838	00

Schedule L Balance Sheet	Beginning of taxable year		End of taxable year	
	(a)	(b)	(c)	(d)
Assets				
1 Cash		4,529,873	•	7,639,378
2 Net accounts receivable		2,033,088	•	2,060,622
3 Net notes receivable			•	
4 Inventories			•	
5 Federal and state government obligations			•	
6 Investments in other bonds			•	
7 Investments in stock			•	
8 Mortgage loans			•	
9 Other investments			•	
10 a Depreciable assets				
b Less accumulated depreciation	()	()		
11 Land			•	
12 Other assets STMT 4		40,484	•	275,217
13 Total assets		6,603,445		9,975,217
Liabilities and net worth				
14 Accounts payable		398,029	•	1,125,562
15 Contributions, gifts, or grants payable			•	
16 Bonds and notes payable			•	
17 Mortgages payable			•	
18 Other liabilities STMT 5		1,444,680		2,042,357
19 Capital stock or principal fund			•	
20 Paid-in or capital surplus. Attach reconciliation			•	
21 Retained earnings or income fund		4,760,736	•	6,807,298
22 Total liabilities and net worth		6,603,445		9,975,217

Schedule M-1 Reconciliation of income per books with income per return			
Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$50,000.			
1 Net income per books	•	2,046,562	7 Income recorded on books this year not included in this return. Attach schedule
2 Federal income tax	•		8 Deductions in this return not charged against book income this year. Attach schedule
3 Excess of capital losses over capital gains	•		9 Total. Add line 7 and line 8
4 Income not recorded on books this year. Attach schedule	•		10 Net income per return. Subtract line 9 from line 6
5 Expenses recorded on books this year not deducted in this return. Attach schedule	•		
6 Total. Add line 1 through line 5		2,046,562	
			2,046,562

EXCEL ACADEMY CHARTER SCHOOLS

47-4121751

CA 199	OTHER INCOME	STATEMENT 1
<u>DESCRIPTION</u>		<u>AMOUNT</u>
OTHER REVENUE		11,204.
TOTAL TO FORM 199, PART II, LINE 7		<u>11,204.</u>

CA 199	COMPENSATION OF OFFICERS, DIRECTORS AND TRUSTEES	STATEMENT 2
--------	--	-------------

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HRS WORKED/WK</u>	<u>COMPENSATION</u>
HEIDI GASCA 1 TECHNOLOGY DRIVE, BLDG I, 811 IRVINE, CA 92618	EXECUTIVE DIRECTOR 40.00	223,578.
LARRY ALVARADO 1 TECHNOLOGY DRIVE, BLDG I, 811 IRVINE, CA 92618	MEMBER 2.00	12,525.
DR WILLIAM HALL 1 TECHNOLOGY DRIVE, BLDG I, 811 IRVINE, CA 92618	PRESIDENT 5.00	12,450.
MICHAEL HUMPHREY 1 TECHNOLOGY DRIVE, BLDG I, 811 IRVINE, CA 92618	VICE PRESIDENT 2.00	7,537.
STEVE FRAIRE 1 TECHNOLOGY DRIVE, BLDG I, 811 IRVINE, CA 92618	CLERK 2.00	7,500.
SUSAN HOULE 1 TECHNOLOGY DRIVE, BLDG I, 811 IRVINE, CA 92618	MEMBER 2.00	7,500.
TOTAL TO FORM 199, PART II, LINE 11		<u>271,090.</u>

EXCEL ACADEMY CHARTER SCHOOLS47-4121751

CA 199

OTHER EXPENSES

STATEMENT 3

DESCRIPTIONAMOUNT

INSTRUCTIONAL MATERIALS	1,804,177.
OTHER EXPENSES	356,722.
PENSION PLAN CONTRIBUTIONS	1,522,875.
OTHER EMPLOYEE BENEFITS	1,244,156.
MANAGEMENT FEES	355,664.
LEGAL FEES	301,880.
ACCOUNTING FEES	30,897.
OTHER PROFESSIONAL FEES	2,443,665.
ADVERTISING AND PROMOTION	16,727.
OFFICE EXPENSES	60,184.
INFORMATION TECHNOLOGY	306,175.
TRAVEL	120,970.
INSURANCE	70,808.
TOTAL TO FORM 199, PART II, LINE 17	<u>8,634,900.</u>

CA 199

OTHER ASSETS

STATEMENT 4

DESCRIPTIONBEG. OF YEAREND OF YEAR

PREPAID EXPENSES AND DEFERRED CHARGES	40,484.	152,190.
RIGHT OF USE ASSETS	0.	123,027.
TOTAL TO FORM 199, SCHEDULE L, LINE 12	<u>40,484.</u>	<u>275,217.</u>

CA 199

OTHER LIABILITIES

STATEMENT 5

DESCRIPTIONBEG. OF YEAREND OF YEAR

LEASE LIABILITY	0.	125,407.
DEFERRED REVENUE	195,912.	1,854,456.
UNSECURED NOTES AND LOANS PAYABLE	1,248,768.	62,494.
TOTAL TO FORM 199, SCHEDULE L, LINE 18	<u>1,444,680.</u>	<u>2,042,357.</u>

EXCEL ACADEMY CHARTER SCHOOLS

47-4121751

CA 199

FUND BALANCES

STATEMENT 6

<u>DESCRIPTION</u>	<u>BEG. OF YEAR</u>	<u>END OF YEAR</u>
NET ASSETS WITHOUT DONOR RESTRICTIONS	4,760,736.	6,807,298.
TOTAL TO FORM 199, SCHEDULE L, LINE 21	<u>4,760,736.</u>	<u>6,807,298.</u>

022
Date Accepted _____

DO NOT MAIL THIS FORM TO THE FTB

TAXABLE YEAR
2022

California e-file Return Authorization for Exempt Organizations

FORM
8453-EO

Exempt Organization name	Identifying number
EXCEL ACADEMY CHARTER SCHOOLS	47-4121751

Part I Electronic Return Information (whole dollars only)

1 Total gross receipts (Form 199, line 4)	1	20,943,400
2 Total gross income (Form 199, line 8)	2	20,943,400
3 Total expenses and disbursements (Form 199, line 9)	3	18,896,838

Part II Settle Your Account Electronically for Taxable Year 2022

4 <input type="checkbox"/> Electronic funds withdrawal	4a Amount	4b Withdrawal date (mm/dd/yyyy)
--	-----------	---------------------------------

Part III Banking Information (Have you verified the exempt organization's banking information?)

5 Routing number _____	7 Type of account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
6 Account number _____	

Part IV Declaration of Officer


I authorize the exempt organization's account to be settled as designated in Part II. If I check Part II, box 4, I authorize an electronic funds withdrawal for the amount listed on line 4a.

Under penalties of perjury, I declare that I am an officer of the above exempt organization and that the information I provided to my electronic return originator (ERO), transmitter, or intermediate service provider and the amounts in Part I above agree with the amounts on the corresponding lines of the exempt organization's 2022 California electronic return. To the best of my knowledge and belief, the exempt organization's return is true, correct, and complete. If the exempt organization is filing a balance due return, I understand that if the Franchise Tax Board (FTB) does not receive full and timely payment of the exempt organization's fee liability, the exempt organization will remain liable for the fee liability and all applicable interest and penalties. I authorize the exempt organization return and accompanying schedules and statements be transmitted to the FTB by the ERO, transmitter, or intermediate service provider. **If the processing of the exempt organization's return or refund is delayed, I authorize the FTB to disclose to the ERO or intermediate service provider the reason(s) for the delay.**

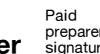
Sign Here  3/24/2024 **EXECUTIVE DIRECTOR**

Part V Declaration of Electronic Return Originator (ERO) and Paid Preparer.

I declare that I have reviewed the above exempt organization's return and that the entries on form FTB 8453-EO are complete and correct to the best of my knowledge. (If I am only an intermediate service provider, I understand that I am not responsible for reviewing the exempt organization's return. I declare, however, that form FTB 8453-EO accurately reflects the data on the return.) I have obtained the organization officer's signature on form FTB 8453-EO before transmitting this return to the FTB; I have provided the organization officer with a copy of all forms and information that I will file with the FTB, and I have followed all other requirements described in FTB Pub. 1345, 2022 Handbook for Authorized e-file Providers. I will keep form FTB 8453-EO on file for **four** years from the due date of the return or **four** years from the date the exempt organization return is filed, whichever is later, and I will make a copy available to the FTB upon request. If I am also the paid preparer, under penalties of perjury, I declare that I have examined the above exempt organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

ERO Must Sign	ERO's signature 	Date	Check if also paid preparer <input checked="" type="checkbox"/>	Check if self-employed <input type="checkbox"/>	ERO's PTIN
	MEI-LI HUANG				P02383735
	Firm's name (or yours if self-employed) and address	Firm's FEIN			
	CLIFTONLARSONALLEN LLP 2210 EAST ROUTE 66 GLENDDORA, CA	41-0746749			ZIP code 91740

Under penalties of perjury, I declare that I have examined the above organization's return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. I make this declaration based on all information of which I have knowledge.

Paid Preparer Must Sign	Paid preparer's signature 	Date	Check if self-employed <input type="checkbox"/>	Paid preparer's PTIN
	Firm's name (or yours if self-employed) and address	Firm's FEIN		
		ZIP code		

FTB 8453-EO 2022

Form **990**

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990 for instructions and the latest information.

2022

Open to Public Inspection

A For the **2022** calendar year, or tax year beginning **JUL 1, 2022** and ending **JUN 30, 2023**


B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization EXCEL ACADEMY CHARTER SCHOOLS Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite 1 TECHNOLOGY DRIVE, BLDG I 811 City or town, state or province, country, and ZIP or foreign postal code IRVINE, CA 92618 F Name and address of principal officer: HEIDI GASCA SAME AS C ABOVE	D Employer identification number 47-4121751 E Telephone number 949-387-7822 G Gross receipts \$ 20,943,400. H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions H(c) Group exemption number
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) () (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
J Website: WWW.EXCELACADEMY.EDUCATION		
K Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		
L Year of formation: 2015		M State of legal domicile: CA

Part I Summary

	1	Briefly describe the organization's mission or most significant activities: THE CORPORATION OPERATES TUITION FREE CHARTER SCHOOL PROGRAMS WHERE TEACHERS AND PARENTS PARTNER		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
Activities & Governance	3	Number of voting members of the governing body (Part VI, line 1a)	3	5
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	5
	5	Total number of individuals employed in calendar year 2022 (Part V, line 2a)	5	144
	6	Total number of volunteers (estimate if necessary)	6	0
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
	7b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.
	Revenue	8	Contributions and grants (Part VIII, line 1h)	22,687,187.
9		Program service revenue (Part VIII, line 2g)	0.	0.
10		Investment income (Part VIII, column (A), lines 3, 4, and 7d)	7,844.	79,742.
11		Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	226,907.	11,204.
12		Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	22,921,938.	20,943,400.
Expenses		13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	11,875,032.	12,873,259.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b	Total fundraising expenses (Part IX, column (D), line 25)	0.	0.
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	7,391,350.	6,023,579.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	19,266,382.	18,896,838.
	19	Revenue less expenses. Subtract line 18 from line 12	3,655,556.	2,046,562.
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	6,603,445.	9,975,217.
	21	Total liabilities (Part X, line 26)	1,842,709.	3,167,919.
	22	Net assets or fund balances. Subtract line 21 from line 20	4,760,736.	6,807,298.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	DocuSigned by:  Signature of officer	3/24/2024 Date		
Paid Preparer Use Only	Print/Type preparer's name MEI-LI HUANG	Preparer's signature MEI-LI HUANG	Date 03/22/24	Check <input type="checkbox"/> if self-employed PTIN P02383735
	Firm's name CLIFTONLARSONALLEN LLP	Firm's EIN 41-0746749		
	Firm's address 2210 EAST ROUTE 66 GLENDORA, CA 91740			Phone no. (626) 857-7300

May the IRS discuss this return with the preparer shown above? See instructions Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III [X]

1 Briefly describe the organization's mission: PROVIDES A 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

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [] Yes [X] No If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 16,666,253. including grants of \$) (Revenue \$) OFFERING AN INDEPENDENT STUDY PERSONALIZED LEARNING MODEL FOR STUDENTS IN GRADES TK-12. ALLOWING PARENTS TO SELECT A WIDE VARIETY OF EDUCATIONAL RESOURCES AND MATERIALS FROM APPROVED CONTENT AND COMMUNITY PROVIDERS USING STATE INSTRUCTIONAL FUND. THE ORGANIZATION SERVED APPROXIMATELY 1,590 STUDENTS.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe on Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 16,666,253.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions		X
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>		X
b Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>		X
c Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	X	
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I.</i> See instructions		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	X	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		X
26 Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>		X
b A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>		X
c A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X
38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?	X	

Note: All Form 990 filers are required to complete Schedule O

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable		
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable		
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
	2a		144
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b	If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation on Schedule O</i>		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b	If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d	If "Yes," indicate the number of Forms 8282 filed during the year		
	7d		
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
10	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?		X
b	If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation on Schedule O</i>		
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.		X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.		X
17	Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.		

Part VI Governance, Management, and Disclosure. For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
1b	Enter the number of voting members included on line 1a, above, who are independent		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
6	Did the organization have members or stockholders?		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
7b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
8a	The governing body?	X	
8b	Each committee with authority to act on behalf of the governing body?		X
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Did the organization have local chapters, branches, or affiliates?		X
10b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	X	
11b	Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
12b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	X	
13	Did the organization have a written whistleblower policy?	X	
14	Did the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
15a	The organization's CEO, Executive Director, or top management official	X	
15b	Other officers or key employees of the organization	X	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
16b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed CA
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records
JOE SORRERA - (949) 387-7822
1 TECHNOLOGY DRIVE I-811, IRVINE, CA 92816

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
 - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
 - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
 - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) HEIDI GASCA EXECUTIVE DIRECTOR	40.00			X			192,145.	0.	38,504.	
(2) KERI SCHNEEWEISS DIRECTOR OF OPERATIONS	40.00				X		152,640.	0.	44,562.	
(3) LARA C ULMER ASSIST DIR OF SPED	40.00				X		149,961.	0.	46,813.	
(4) LEAH VIDES SPECIAL EDUCATION PROGRAM SPECIALIST	40.00				X		118,898.	0.	41,023.	
(5) JENNIFER CRAIG ASSIST DIR OF ASSESSMENT	40.00				X		126,234.	0.	0.	
(6) LORRIE M WOOD ASSISTANT PRINCIPAL	40.00				X		108,618.	0.	36,208.	
(7) LARRY ALVARADO MEMBER	2.00	X					12,525.	0.	0.	
(8) DR WILLIAM HALL PRESIDENT	5.00	X		X			12,450.	0.	0.	
(9) MICHAEL HUMPHREY VICE PRESIDENT	2.00	X		X			7,537.	0.	0.	
(10) STEVE FRAIRE CLERK	2.00	X		X			7,500.	0.	0.	
(11) SUSAN HOULE MEMBER	2.00	X					7,500.	0.	0.	

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
1b Subtotal							896,008.	0.	207,110.	
c Total from continuation sheets to Part VII, Section A							0.	0.	0.	
d Total (add lines 1b and 1c)							896,008.	0.	207,110.	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 9

	Yes	No
3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

			(A)	(B)	(C)	(D)	
			Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e	20,852,454.				
	f All other contributions, gifts, grants, and similar amounts not included above	1f					
	g Noncash contributions included in lines 1a-1f	1g	\$				
	h Total. Add lines 1a-1f			20,852,454.			
Program Service Revenue	2 a	Business Code					
	b						
	c						
	d						
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f						
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		79,742.			79,742.	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6 a Gross rents	6a	(i) Real				
			(ii) Personal				
	b Less: rental expenses	6b					
	c Rental income or (loss)	6c					
	d Net rental income or (loss)						
	7 a Gross amount from sales of assets other than inventory	7a	(i) Securities				
			(ii) Other				
	b Less: cost or other basis and sales expenses	7b					
	c Gain or (loss)	7c					
d Net gain or (loss)							
8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	8a						
b Less: direct expenses	8b						
c Net income or (loss) from fundraising events							
9 a Gross income from gaming activities. See Part IV, line 19	9a						
b Less: direct expenses	9b						
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances	10a						
b Less: cost of goods sold	10b						
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue	11 a OTHER REVENUE	Business Code	611600	11,204.		11,204.	
	b						
	c						
	d All other revenue						
	e Total. Add lines 11a-11d			11,204.			
12 Total revenue. See instructions			20,943,400.	0.	0.	90,946.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	271,090.	271,090.		
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	9,605,731.	8,709,203.	896,528.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	1,522,875.	1,497,876.	24,999.	
9 Other employee benefits	1,244,156.	1,060,739.	183,417.	
10 Payroll taxes	229,407.	171,518.	57,889.	
11 Fees for services (nonemployees):				
a Management	355,664.	355,664.		
b Legal	301,880.	301,880.		
c Accounting	30,897.	30,897.		
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	2,443,665.	1,646,364.	797,301.	
12 Advertising and promotion	16,727.	16,727.		
13 Office expenses	60,184.	60,184.		
14 Information technology	306,175.	306,175.		
15 Royalties				
16 Occupancy	96,100.	14,480.	81,620.	
17 Travel	120,970.	73,230.	47,740.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
19 Conferences, conventions, and meetings				
20 Interest	59,610.	59,610.		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance	70,808.	10,883.	59,925.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a INSTRUCTIONAL MATERIALS	1,804,177.	1,786,160.	18,017.	
b OTHER EXPENSES	356,722.	293,573.	63,149.	
c				
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	18,896,838.	16,666,253.	2,230,585.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	3,035,209.	1	2,963,183.
	2 Savings and temporary cash investments	1,494,664.	2	4,676,195.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	2,033,088.	4	2,060,622.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	40,484.	9	152,190.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a		
	b Less: accumulated depreciation	10b	10c	
	11 Investments - publicly traded securities		11	
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	0.	15	123,027.
16 Total assets. Add lines 1 through 15 (must equal line 33)	6,603,445.	16	9,975,217.	
Liabilities	17 Accounts payable and accrued expenses	398,029.	17	1,125,562.
	18 Grants payable		18	
	19 Deferred revenue	195,912.	19	1,854,456.
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties	1,248,768.	24	62,494.
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	0.	25	125,407.
	26 Total liabilities. Add lines 17 through 25	1,842,709.	26	3,167,919.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	4,760,736.	27	6,807,298.
	28 Net assets with donor restrictions		28	
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	4,760,736.	32	6,807,298.
33 Total liabilities and net assets/fund balances	6,603,445.	33	9,975,217.	

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	20,943,400.
2	Total expenses (must equal Part IX, column (A), line 25)	2	18,896,838.
3	Revenue less expenses. Subtract line 2 from line 1	3	2,046,562.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	4,760,736.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	6,807,298.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		X
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2b	Were the organization's financial statements audited by an independent accountant?	X	
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:			
<input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
2c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	X	
3b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits	X	

Form 990 (2022)

SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
Attach to Form 990 or Form 990-EZ.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization EXCEL ACADEMY CHARTER SCHOOLS	Employer identification number 47-4121751
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Part I Reason for Public Charity Status. (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f))	14	%
15 Public support percentage from 2021 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2022. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 33 1/3% support test - 2021. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2022. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 10% -facts-and-circumstances test - 2021. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions		<input type="checkbox"/>

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2021 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2021 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2022. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

b 33 1/3% support tests - 2021. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
b A family member of a person described on line 11a above?		
c A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
3 By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
2 Activities Test. Answer lines 2a and 2b below.			
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>	Yes	No	
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>			
3 Parent of Supported Organizations. Answer lines 3a and 3b below.			
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No" provide details in Part VI.</i>			
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>			

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). **See instructions.**
 All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2022 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2022	(iii) Distributable Amount for 2022
1	Distributable amount for 2022 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2022 (reasonable cause required - explain in Part VI). See instructions.		
3	Excess distributions carryover, if any, to 2022		
a	From 2017		
b	From 2018		
c	From 2019		
d	From 2020		
e	From 2021		
f	Total of lines 3a through 3e		
g	Applied to underdistributions of prior years		
h	Applied to 2022 distributable amount		
i	Carryover from 2017 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2022 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2022 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.		
6	Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.		
7	Excess distributions carryover to 2023. Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2018		
b	Excess from 2019		
c	Excess from 2020		
d	Excess from 2021		
e	Excess from 2022		

Schedule A (Form 990) 2022

Part VI

Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.
(See instructions.)

Multiple horizontal lines for supplemental information input.

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization: EXCEL ACADEMY CHARTER SCHOOLS Employer identification number: 47-4121751

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two Yes/No questions regarding donor property and grant fund usage.

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include purpose of easements, total number and acreage, number of easements on historic structures, and monitoring expenses. Includes a sub-table for 'Held at the End of the Tax Year' with rows 2a, 2b, 2c, 2d.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include questions about reporting art and historical treasures, and a table for reporting revenue and assets.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2022

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
- a Public exhibition
 - b Scholarly research
 - c Preservation for future generations
 - d Loan or exchange program
 - e Other _____
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|---------------------------------|--------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? Yes No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment _____%
 - b Permanent endowment _____%
 - c Term endowment _____%
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- | | Yes | No |
|---|--------|----|
| (i) Unrelated organizations | 3a(i) | |
| (ii) Related organizations | 3a(ii) | |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? <input type="checkbox"/> | 3b | |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) 0.

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) LEASE LIABILITY	125,407.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ...

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements	1	20,943,400.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	0.
3	Subtract line 2e from line 1	3	20,943,400.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	20,943,400.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements	1	18,896,838.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	0.
3	Subtract line 2e from line 1	3	18,896,838.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	18,896,838.

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART X, LINE 2:

THE SCHOOL IS PART OF A NONPROFIT CORPORATION EXEMPT FROM THE PAYMENT OF INCOME TAXES UNDER INTERNAL REVENUE CODE SECTION 501(C)(3) AND CALIFORNIA REVENUE AND TAXATION CODE SECTION 23701D. ACCORDINGLY, NO PROVISION HAS BEEN MADE FOR INCOME TAXES. MANAGEMENT HAS DETERMINED THAT ALL INCOME TAX POSITIONS ARE MORE LIKELY THAN NOT OF BEING SUSTAINED UPON POTENTIAL AUDIT OR EXAMINATION; THEREFORE, NO DISCLOSURES OF UNCERTAIN INCOME TAX POSITIONS ARE REQUIRED. THE SCHOOL IS SUBJECT TO INCOME TAX ON NET INCOME THAT IS DERIVED FROM BUSINESS ACTIVITIES THAT ARE UNRELATED TO THE EXEMPT PURPOSES. THE SCHOOL FILES AND EXEMPT SCHOOL RETURN AND APPLICABLE UNRELATED BUSINESS INCOME TAX RETURN IN THE U.S. FEDERAL JURISDICTION AND WITH THE CALIFORNIA FRANCHISE TAX BOARD.

Part XIII Supplemental Information *(continued)*

Multiple horizontal lines for supplemental information.

SCHEDULE E
(Form 990)

Schools

OMB No. 1545-0047

Complete if the organization answered "Yes" on Form 990, Part IV, line 13, or Form 990-EZ, Part VI, line 48.

2022

Department of the Treasury
Internal Revenue Service

Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for the latest information.

Open to Public Inspection

Name of the organization

EXCEL ACADEMY CHARTER SCHOOLS

Employer identification number

47-4121751

Part I

	YES	NO
1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Has the organization publicized its racially nondiscriminatory policy on its primary publicly accessible Internet homepage at all times during its tax year in a manner reasonably expected to be noticed by visitors to the homepage, or through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe. If "No," please explain. If you need more space, use Part II	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<u>THE SCHOOL PUBLICIZES ITS POLICY IN ITS REGISTRATION</u> <u>MATERIALS AND DOCUMENTS USED TO SOLICIT STUDENTS AND ON THE</u> <u>SCHOOL'S WEBSITE AT</u> <u>HTTPS://EXCELACADEMY.EDUCATION/RESOURCES/2021-2022-HANDBOOK.</u>		
4 Does the organization maintain the following?		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? ..	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
d Copies of all material used by the organization or on its behalf to solicit contributions?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
If you answered "No" to any of the above, please explain. If you need more space, use Part II.		
5 Does the organization discriminate by race in any way with respect to:		
a Students' rights or privileges?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b Admissions policies?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
c Employment of faculty or administrative staff?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d Scholarships or other financial assistance?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
e Educational policies?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
f Use of facilities?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
g Athletic programs?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
h Other extracurricular activities?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If you answered "Yes" to any of the above, please explain. If you need more space, use Part II.		
6a Does the organization receive any financial aid or assistance from a governmental agency?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b Has the organization's right to such aid ever been revoked or suspended?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
If you answered "Yes" on either line 6a or line 6b, explain on Part II.		
7 Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, as modified by Rev. Proc. 2019-22, 2019-22 I.R.B. 1260, covering racial nondiscrimination? If "No," explain on Part II	<input checked="" type="checkbox"/>	<input type="checkbox"/>

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule E (Form 990) 2022

Part II **Supplemental Information.** Provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also provide any other additional information. See instructions.

LINE 6 - EXPLANATION OF GOVERNMENT FINANCIAL AID:

THE SCHOOL IS A PUBLIC CHARTER SCHOOL PRINCIPALLY FUNDED BY CALIFORNIA AND FEDERAL MONIES RECEIVED THROUGH THE CALIFORNIA DEPARTMENT OF EDUCATION.

Multiple horizontal lines for supplemental information.

**SCHEDULE J
(Form 990)**

Compensation Information

OMB No. 1545-0047

2022

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
 Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
 Attach to Form 990.
 Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

Name of the organization

EXCEL ACADEMY CHARTER SCHOOLS

Employer identification number

47-4121751

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- | | |
|--|--|
| <input type="checkbox"/> First-class or charter travel | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees |
| <input type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?

3 Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- | | |
|--|---|
| <input type="checkbox"/> Compensation committee | <input checked="" type="checkbox"/> Written employment contract |
| <input type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study |
| <input type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

4 During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment? **4a**
- b** Participate in or receive payment from a supplemental nonqualified retirement plan? **4b**
- c** Participate in or receive payment from an equity-based compensation arrangement? **4c**
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? **5a**
- b** Any related organization? **5b**
- If "Yes" on line 5a or 5b, describe in Part III.

6 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? **6a**
- b** Any related organization? **6b**
- If "Yes" on line 6a or 6b, describe in Part III.

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III

8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
1b		
2		
4a		X
4b		X
4c		X
5a		X
5b		X
6a		X
6b		X
7		X
8		X
9		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2022

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) HEIDI GASCA EXECUTIVE DIRECTOR	(i)	192,145.	0.	0.	38,504.	0.	230,649.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) KERI SCHNEEWEISS DIRECTOR OF OPERATIONS	(i)	152,640.	0.	0.	31,119.	13,443.	197,202.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) LARA C ULMER ASSIST DIR OF SPED	(i)	149,961.	0.	0.	30,997.	15,816.	196,774.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) LEAH VIDES SPECIAL EDUCATION PROGRAM SPECIALIST	(i)	118,898.	0.	0.	25,623.	15,400.	159,921.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 3:

THE OFFICERS' AND KEY EMPLOYEES' PAY IS DETERMINE BASED ON DATA PROVIDED BY EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS. THE BOARD MUST VOTE TO APPROVE THE OFFICERS' AND KEY EMPLOYEES' COMPENSATION AS A DIRECT ACTION.

**SCHEDULE O
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

Open to Public
Inspection

Name of the organization

EXCEL ACADEMY CHARTER SCHOOLS

Employer identification number

47-4121751

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

TOGETHER.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

STUDENTS CREATING THE NEXT GENERATION OF LEADERS.

FORM 990, PART VI, SECTION A, LINE 8B:

THERE ARE NO COMMITTEES THAT CAN ACT ON BEHALF OF THE BOARD.

FORM 990, PART VI, SECTION B, LINE 11B:

THE FORM 990 IS PREPARED BY THE ORGANIZATION'S OUTSIDE PUBLIC ACCOUNTING
FIRM BASED ON INFORMATION PROVIDED BY MANAGEMENT. ONCE A DRAFT OF THE
RETURN IS AVAILABLE, IT IS REVIEWED BY MANAGEMENT WITH ANY CHANGES OR
REVISIONS INCORPORATED INTO THE FILING. THE REVISED RETURN IS THEN
SUBMITTED TO THE BOARD OF DIRECTORS FOR THEIR REVIEW AND APPROVAL PRIOR TO
SUBMITTING TO THE IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

MONITORING IS PERFORMED REGULARLY BY THE OFFICERS TO IDENTIFY POTENTIAL
CONFLICTS OF INTEREST. ANY QUESTION OF A CONFLICT IS ADDRESSED WITH THE
INTERESTED PERSON, WHO IS REQUIRED TO DISCLOSE THE EXISTENCE OF ANY
FINANCIAL INTEREST AND BE AFFORDED THE OPPORTUNITY TO DISCLOSE ALL MATERIAL
FACTS TO THE BOARD AND EXECUTIVE DIRECTOR. IF A CONFLICT OF INTEREST IS
IDENTIFIED, THE APPROPRIATE ACTION IS TAKEN, INCLUDING LIMITATIONS TO THE
INDIVIDUAL'S INFLUENCE ON RELATED BUSINESS MATTERS.

Schedule O (Form 990) 2022

Page 2

Name of the organization EXCEL ACADEMY CHARTER SCHOOLS	Employer identification number 47-4121751
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FORM 990, PART VI, SECTION B, LINE 15:

THE EXECUTIVE DIRECTOR'S PAY IS DETERMINED BASED ON DATA PROVIDED BY EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS. THE BOARD MUST VOTE TO APPROVE THE EXECUTIVE DIRECTOR'S COMPENSATION AS A DIRECT ACTION. THE OFFICERS' AND KEY EMPLOYEES' PAY IS DETERMINE BASED ON DATA PROVIDED BY EXTERNAL CHARTER MANAGEMENT ORGANIZATIONS AND THROUGH COMPARISON STUDIES OF OTHER CHARTER SCHOOLS. THE BOARD MUST VOTE TO APPROVE THE OFFICERS' AND KEY EMPLOYEES' COMPENSATION AS A DIRECT ACTION.

THE PROCESS DESCRIBED HERE WAS LAST COMPLETED IN 2023.

FORM 990, PART VI, SECTION C, LINE 19:

THE DOCUMENTS ARE READILY AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IX, LINE 11G, OTHER FEES:**SPED CONSULTANTS :**

PROGRAM SERVICE EXPENSES	327,257.
MANAGEMENT AND GENERAL EXPENSES	14,700.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	341,957.

PROFESSIONAL SERVICES - NON-INSTRUCTIONALS:

PROGRAM SERVICE EXPENSES	0.
MANAGEMENT AND GENERAL EXPENSES	137,008.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	137,008.

INSTRUCTIONAL VENDOR AND CONSULTANTS:

232212 10-28-22

Schedule O (Form 990) 2022

Name of the organization EXCEL ACADEMY CHARTER SCHOOLS	Employer identification number 47-4121751
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PROGRAM SERVICE EXPENSES	1,319,107.
MANAGEMENT AND GENERAL EXPENSES	621,671.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	1,940,778.

MISC. OTHER OUTSIDE SERVICES:

PROGRAM SERVICE EXPENSES	0.
MANAGEMENT AND GENERAL EXPENSES	23,922.
FUNDRAISING EXPENSES	0.
TOTAL EXPENSES	23,922.

TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A **2,443,665.**

FORM 990, PART XII, LINE 2C:

THE PROCESS DID NOT CHANGE FROM PRIOR YEAR.

Certificate Of Completion

Envelope Id: 8EF8C8FDB69A416399308BE6C9D9D9D0	Status: Completed
Subject: Tax Return for Excel Academy Charter Schools- A274636 - 2022	
Client Name: Excel Academy Charter Schools	
Client Number: A274636	
Source Envelope:	
Document Pages: 77	Signatures: 5
Certificate Pages: 5	Initials: 1
AutoNav: Enabled	Envelope Originator:
Enveloped Stamping: Enabled	CLA Operations
Time Zone: (UTC-06:00) Central Time (US & Canada)	220 S 6th St Ste 300
	Minneapolis, MN 55402-1418
	Erlinda.Tomas@claconnect.com
	IP Address: 47.177.137.94

Record Tracking

Status: Original	Holder: CLA Operations	Location: DocuSign
3/22/2024 7:55:27 PM	Erlinda.Tomas@claconnect.com	

Signer Events

Heidi Gasca
 hgasca@excelacademy.education
 Security Level: Email, Account Authentication (None), Access Code

Signature



Signature Adoption: Pre-selected Style
 Using IP Address: 68.119.138.92

Timestamp

Sent: 3/22/2024 7:58:10 PM
 Viewed: 3/23/2024 4:03:54 PM
 Signed: 3/24/2024 6:17:22 PM

Electronic Record and Signature Disclosure:
 Accepted: 3/23/2024 4:03:54 PM
 ID: 23a5f104-06ee-4b62-8460-a29d2ed7cf5a

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp

Lili Huang Lili.Huang@claconnect.com Business Assurance Principal CLA Security Level: Email, Account Authentication (None)	COPIED	Sent: 3/22/2024 7:58:10 PM
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Electronic Record and Signature Disclosure:
 Not Offered via DocuSign

Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	3/22/2024 7:58:10 PM
Certified Delivered	Security Checked	3/23/2024 4:03:54 PM

Envelope Summary Events	Status	Timestamps
Signing Complete	Security Checked	3/24/2024 6:17:22 PM
Completed	Security Checked	3/24/2024 6:17:22 PM

Payment Events	Status	Timestamps
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Electronic Record and Signature Disclosure

ELECTRONIC RECORD AND SIGNATURE DISCLOSURE

From time to time, CliftonLarsonAllen LLP (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through the DocuSign system. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to this Electronic Record and Signature Disclosure (ERSD), please confirm your agreement by selecting the check-box next to 'I agree to use electronic records and signatures' before clicking 'CONTINUE' within the DocuSign system.

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At any time, you may request from us a paper copy of any record provided or made available electronically to you by us. You will have the ability to download and print documents we send to you through the DocuSign system during and immediately after the signing session and, if you elect to create a DocuSign account, you may access the documents for a limited period of time (usually 30 days) after such documents are first sent to you. After such time, if you wish for us to send you paper copies of any such documents from our office to you, you will be charged a \$0.00 per-page fee. You may request delivery of such paper copies from us by following the procedure described below.

Withdrawing your consent

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

All notices and disclosures will be sent to you electronically

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

How to contact CliftonLarsonAllen LLP:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: BusinessTechnology@CLAconnect.com

To advise CliftonLarsonAllen LLP of your new email address

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at BusinessTechnology@CLAconnect.com and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

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To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to BusinessTechnology@CLAconnect.com and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

To withdraw your consent with CliftonLarsonAllen LLP

To inform us that you no longer wish to receive future notices and disclosures in electronic format you may:

i. decline to sign a document from within your signing session, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;

ii. send us an email to BusinessTechnology@CLAconnect.com and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

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The minimum system requirements for using the DocuSign system may change over time. The current system requirements are found here: <https://support.docusign.com/guides/signer-guide-signing-system-requirements>.

Acknowledging your access and consent to receive and sign documents electronically

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please confirm that you have read this ERSD, and (i) that you are able to print on paper or electronically save this ERSD for your future reference and access; or (ii) that you are able to email this ERSD to an email address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format as described herein, then select the check-box next to ‘I agree to use electronic records and signatures’ before clicking ‘CONTINUE’ within the DocuSign system.

By selecting the check-box next to ‘I agree to use electronic records and signatures’, you confirm that:

- You can access and read this Electronic Record and Signature Disclosure; and
- You can print on paper this Electronic Record and Signature Disclosure, or save or send this Electronic Record and Disclosure to a location where you can print it, for future reference and access; and
- Until or unless you notify CliftonLarsonAllen LLP as described above, you consent to receive exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you by CliftonLarsonAllen LLP during the course of your relationship with CliftonLarsonAllen LLP.

Coversheet

Approval of California Charter Schools Association (CCSA) Membership for 2024-25 (Renewal)

Section: XII. Business/Financial Services
Item: B. Approval of California Charter Schools Association (CCSA)
Membership for 2024-25 (Renewal)
Purpose: Vote
Submitted by:
Related Material: CCSA Invoice - Excel Academy Charter Schools.doc.pdf

BACKGROUND:

The California Charter Schools Association (CCSA) offers yearly membership to charter schools. As a charter school member, Excel Academy would have access to the full benefits of a regionalized and statewide advocacy network, legal support, community provider selection support, renewal guidance, training and professional development.



California
Charter Schools
Association

PO Box 86087 Los Angeles, CA 90086 • www.ccsa.org

Attn: Accounts Payable
Excel Academy Charter Schools

Membership Invoice

Date		Member ID	
2/27/24		A-09305	
Member Type	Expiration Date	Due Date	
C-Charter School	6/30/2025 at \$15.50 a student		
Description		Number of Students	Amount
A-05422	Excel Academy Charter School Charter School Membership Dues	1007	\$15,608.50
A-05430	Excel Academy Charter School Helendale Charter School Membership Dues	624	\$9,672.00
		Total Amount Due:	\$25,280.50
		Amount Paid:	\$0.00

We appreciate your support and participation! Please email membership@ccsa.org with any questions.

REMITTANCE STUB *Initial Billing*
(Please Return)

Membership through 6/30/2024 at the rate of \$15.50 a student.

Please make checks payable to the California Charter Schools Association. Mail or fax payment to:

Member ID: A-09305
Excel Academy Charter Schools

California Charter Schools Association
PO Box 86087 Los Angeles, CA 90086

Payment Method: You can pay by credit card in the member portal. If you have questions or to update your student count please email membership@ccsa.org

Pay by Wire:
City National Bank
Account #: 401599797
Account Name: California Charter Schools Association



California
Charter Schools
Association

PO Box 86087 Los Angeles, CA 90086 • www.ccsa.org

Bank Routing #: 122016066

Swift Code: CINAUS6L

EIN: 51-0465703

Link to [W-9](#)

Coversheet

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

Section: XII. Business/Financial Services
Item: C. Approval of the EACS Ordering Purchase System (OPS) (Renewal)
Purpose: Vote
Submitted by:
Related Material: OPS-Excel Academy Service Agreement 24-25.pdf

BACKGROUND:

OPS is a purchasing service that allows teachers and parents to place, review, and edit orders for use with instructional funds. Additionally, service vendors have an area where they can log in to see purchase orders requested and approved for their service and submit their invoices after all services have been rendered. This system allows administrative personnel to collect reports on spending, balances, outstanding invoices, and user information.

This Agreement will commence on July 1, 2024, and continue through June 30, 2025. It will automatically renew on a month-to-month term unless either party notifies the other party of its intent not to renew. Upon termination of this Agreement, the School will promptly pay all fees accrued and owing to OPS, and OPS has the right to suspend or terminate the School's and each student's access to the Service.

RECOMMENDATION:

It is recommended that the Board of Directors approve the renewal of the OPS purchasing software services not exceeding \$24,947.19

Client: Excel Academy
Contact: Keri Schneeweiss
Address: 1 Technology Dr., Bldg I-811, Irvine, CA 92618
Phone: 949-742-2399
Date: 4/1/2024
Number: EA-OPS2425
Revision: Original
Service: OPS 24 Annual Subscription 2024-2025

Description

Online Purchasing/Student Accounting System for (Client) Excel Academy

Goals and Scope of Services

Online Purchasing System (OPS 24)

Staff Resources / OPS 24: This application is a sophisticated financial tool that enables school administrators to devolve many purchasing and accounting functions down to the individual student level. The application fosters local empowerment and accountability, while allowing administrators to track and manage the entire purchasing process. Security is of the utmost importance as the application can house sensitive identification and demographic information about students and teachers.

The “Teacher Resources” section allows teachers to request resources and instructional tools on behalf of individual students. It enables administrators to approve requests and oversee the allocation of funds for all students.

System Overview

Password protected login to the system is required. Users of the system have the ability to change their own login password. The Client’s system administrator has total control over all Teacher, VCI Vendor, Parent, and Admin login credentials and account permissions. It is the Client’s responsibility to distribute and manage these.

The System Permits Four Levels of Access:

1. Administrator
2. Teacher
3. Parent (optional custom feature allowing parents to enter requests on behalf of their own children)
4. VCI Vendor (optional custom feature to provide Vendor Course Instructors (VCI) a paperless invoicing process)

Administrator Access:

Administrators with full permissions have the ability to approve and process all orders as well as access, update, or add Teacher, Vendor, and Admin accounts. They also have the ability to create orders for any Student account and manually adjust student budgets. Administrators have control over users’ access.

Teacher Access:

Teachers can access orders, demographic/enrollment information and EU balances only for their own students, both active and inactive. However, they can only make order requests for active students. They can also access vendor demographic information and parent login credentials. Vendor demographic information and online purchasing is available at the Teacher access level, although approval and processing of all orders remains at the Administrator level.

Parent Access: *(optional)*

Parent Resources can access demographic and enrollment information and EU allocation and balances for their own Student(s). Vendor demographic information and online purchasing is available at the Parent Access level. Parent requests automatically alert the Teacher, add a note that the order was requested by the Parent, and begin at the Pre-Pending order status. Once Teachers advance these orders from Pre-Pending to Pending, the approval and processing can begin at the Administrator level.

VCI Vendor Login: *(optional)*

The objective of the Vendor Login feature is to eliminate emailing, mailing, or faxing paper or PDF POs and invoices. The whole process becomes electronic. OPS intends to set up Client with the Vendor Login area and provide training, but it will be the Client's responsibility to set and supply their VCI vendors with passwords and communicate directly with their vendors on the Vendor Login process.

Detailed Customized Reporting Available for:

- Students
- Teachers
- Parents
- Vendors
- Requests
- Purchase Orders
- EMR and VCI Catalog Items (optional add-on)
- Forms are developed based on requirements necessary for the following Order Types
 - Educational Materials and Resources (EMR)
 - Vendor Course Instructors (VCI)
 - Computer Information Systems (CIS)
 - College Courses (CC)
 - Activities
 - Catalog Items (CAT) (optional)
 - Bulk
 - Batch

The import process with live data will be handled by OPS. Forms were developed based on needs specified by existing Charter Schools using OPS. The forms are programmed with JavaScript to provide real time validation and relational field modification by user's browser before it is submitted to the OPS server.

Programming:

OPS's proprietary technology drives the secure, password protected web application to access your school's data, perform the necessary queries and calculations, keep students budgets accurate and maintain accountability of all users. OPS often adds new features and improvements based on user input at no charge.

Punchout Integrations

Set-up Steps:

1. Client will need to set up a business “Pay by Invoice” account with our Punchout Vendors for each of their school districts in OPS. We will put you in touch with an Account Representative who can guide you through the process, if one has not already been established (This process can take on week or more).
2. After Client has received all of the login credentials from the Punchout Vendors, we need to set up the account within OPS. We will add an order dropdown in the Request Form that Teachers, Administrators, and Parents will see. Additionally, we will set it up so that Administrators can send Electronic POs directly to each Punchout Vendor (Three days).

How it Works:

In the OPS Purchasing section, a Teacher (or Admin/Parent ordering on behalf of a Teacher) will select a student, then click the Punchout dropdown menu, select the Vendor, and click the order button. This will take the Teacher/Admin/Parent directly to the Punchout Vendor’s website.

Note: The first time a Teacher uses the punchout feature, they will have to set up their own personalized account and give the selected vendor a few details about themselves, (first and last name, email address, etc.) so the Vendor can provide more personalized service to each Teacher, such as keeping track of previous orders and preferences. This **MUST** be done **BEFORE** an Admin or Parent can order on the Teacher’s behalf.

After the Teacher sets up their account with the vendor, they can begin adding items to their cart on the Vendor’s website for the Student they have selected from the OPS order form. When they are ready, they can proceed to checkout and click “Submit Items for Approval.” After this happens, the user is taken back to OPS to the Pending Order Summary page for that request.

When the order request is Approved, then Processed within OPS by an Admin, a “Send Electronic PO” button will appear. When this button is pressed an electronic PO will be sent to the Vendor in an XML format. The OPS Admin should then get an approval message that the PO has been received by the Vendor. OPS keeps track of whether or not the PO has been sent, so that POs cannot be sent more than once.

After the PO is received and processed by the Vendor, the order is shipped to the address selected, then marked Received, Invoice Matched, and Paid just like other orders.

Additionally, through the Vendors’ Business portal, school Admins can check the status of their business account requests/orders and get more detailed information about their purchasing history.

Project Approach

OPS Deliverables:

- Fully functional Online Purchasing System
- Spreadsheet Templates to be completed by the Client
- Populate databases with Vendor data provided by Client
- Populate databases with current Student data imported from Client SIS
- Annual application rollover on 5/1/2025
- Archival of previous years order data upon rollover to consecutive school year
- Establish nightly SIS bridge (optional)
- Establish accounting expense item export (optional)
- Implement Vendor Login (optional)
- Facilitate Punchout Integrations (optional)
- Implement Parent Access (optional)
- Provide the Punchout Vendor contact for getting Pay by Invoice business account set-up
- Once the Punchout business accounts are established and the credentials are established, OPS intends to set up the accounts within OPS
- Provide additional support in using this new feature, and assist in troubleshooting with Punchout Vendors any issues that may occur
- One online Administrator training session
- Ongoing tech support during normal business hours

Client Deliverables:

- All downloadable documents that are to be posted, provided in digital format. Specifically in PDF or non-modifiable Word Documents
- All data needed to populate back end database in completed set up spreadsheet template provided by OPS. This includes school name, address and tax rate, vendor records, subject categories, counties, custom VCI and EMR PO text, school logo and signature image. EMR vendors can be the same across multiple schools, but VCI data is often region-specific and requires individual sets of VCI records
- Student funding calendar for the purpose of determining the allotment of educational units based on enrollment date
- Funding schedule (i.e. Initial EUs = \$400.00, 01-12-2021 EU = \$300.00)
- Client is responsible for establishing their own "Pay by Invoice" account with Punchout Vendors and to manage and train their staff accordingly

Project Steps

Vendor records, subject categories and counties served are provided directly from the Client using a provided template. Student and Teacher records are imported by means of an automated SIS importer. After all necessary information is received and implemented, the system is presented for final approval prior to going live. It is at this time that online training sessions will be conducted. Student and Teacher records would then update nightly from Client SIS export, inactivating any records with exit dates.

The system should be available for teachers to begin all ordering approximately 1 week after all their student, teacher, and vendor data is provided, or according to a revised schedule.

Travel and related expenses will be billed additionally at cost plus 20% for coordination. Additional customizations beyond the scope of this agreement will be billed at the rate of \$125.00 per hour and outlined in Change Orders that will require Client approval prior to execution.

SERVICES, PRICES AND PAYMENT

Upon execution of the Proposal, Client shall pay OPS a non-refundable advance of amount specified on previous page. Monthly subscription fees are due OPS on the first day of every month and/or as of the date listed therefor in the Proposal. Late payments will incur a \$20 late fee. If Client halts work or wishes to terminate this Agreement, Client agrees to pay for all work completed or hours spent, and any pre-approved out-of-pocket expenses incurred. Any prepayment or monthly fees received by OPS shall be non-refundable. For any Services requiring OPS to travel, Client agrees to reimburse OPS for its actual, reasonable travel and other out-of-pocket expenses. Client shall be responsible for any collection expenses, and for all taxes associated with the Services, except those based on OPS's net income. If Client becomes delinquent in its payments, any deliverables due to Client may be withheld until Client is current, and late fees may be charged. Upon payment therefor, any and all deliverables conceived by OPS during this engagement relative to OPS's duties under this Agreement (the "Deliverables") shall be licensed by OPS to the Client on a perpetual basis for the purpose directly listed in the Proposal and no other purpose. If OPS works on materials or documents provided by Client ("Materials"), the Materials shall belong to the party holding title thereto. Client hereby assigns any and all potential right, title, interest and claims to the Deliverables to OPS. Client shall not transfer or copy the Deliverables for delivery to any party for utilization by said party without OPS's prior consent; provided, however that Client may assign the Deliverables in any merger, acquisition, or other purchase or transfer of Client's assets. The intent of the preceding sentence is to prevent Client from disseminating templates or the like designed by OPS for Client to other parties with whom OPS may contract in the future, thereby potentially decreasing the market for OPS's services. Client is responsible for using any Deliverables to achieve Client's intended results. Client authorizes OPS to access its account, with "write permission" for the Client's web page directory, cgi-bin directory, and any other directories or programs that need access for OPS to perform the Services. OPS may rely on all decisions and approvals made by employees and agents of Client, oral or written (including extranet or email). Client's request for any changes must be in writing. OPS shall not be obligated to perform tasks described in Client's request until the Parties agree in writing to the proposed change and hourly rate therefor. Upon contract signing, OPS may mention its relationship, show its work, and utilize Client's logo in marketing presentations, and, upon delivery of its work, if desired by OPS, link OPS's web site to the area on Client's site displaying the Deliverables, and, at OPS's request, Client shall include OPS's logo in an appropriate area on its web site, which OPS may revoke at its discretion.

CONFIDENTIALITY

Each Party agrees to maintain the confidentiality of any business, operational or technical information provided by the other Party pursuant to this Agreement hereunder that a reasonably prudent person would understand to be revealed under a duty of confidentiality (the "Proprietary Information"), and to only use it in carrying out its rights and obligations under this Agreement. The Services furnished by OPS, its intake process and link/email survey and form questions promulgated to the Client, its creative brief made therefrom, and the terms of and pricing under this Agreement are OPS's Proprietary Information. The confidentiality obligations shall not apply to any material or information that the receiving Party can document (i) is or becomes generally available to the public; (ii) was in its possession or known by it prior to receipt from the other Party; (iii) was rightfully disclosed to it by a third party; (iv) was independently developed without use of the other Party's Proprietary Information; or (v) is required to be disclosed by law.

WARRANTIES AND DISCLAIMER

OPS shall indemnify, defend and hold Client harmless from and against any third party claims, suits, demands, actions and proceedings, judgments, penalties, damages, costs and expenses (including reasonable legal fees and costs), losses or liabilities ("Damages") arising out of a claim against Client that the deliverables developed by OPS and provided to Client hereunder constitute an infringement of any copyright held by a third party in the United States, by paying the damages actually awarded against Client in any such suit or proceeding brought by a third party against Client, up to the amount paid by Client hereunder for the offending Deliverable. OPS shall not be obligated to defend or be liable for costs and/or damages under this Section if the alleged infringement (1) arises out of or is in any manner attributable to any modification of any of its deliverables by any other party, or (2) is due to the operation of any computer hardware or software not listed in OPS's technical specifications or (3) arises out of or is in any manner attributable to the collateral or content provided by Client or any other party to OPS for use hereunder (for which Client shall indemnify OPS). Client warrants, represents, and unconditionally guarantees that it has sufficient rights in any and all materials it is providing to OPS hereunder, including but not limited to any elements of text, fonts, graphics, photos, designs, trademark, artwork or the like (the "Client Materials") for OPS to complete the Services contemplated by this Agreement, including but not limited to any necessary authorization, release, clearance or license related to any rights of ownership, privacy, publicity, or intellectual property; and it will not provide OPS for use hereunder with any Client Materials that infringe any third party's intellectual property or other proprietary rights. Client hereby agrees to indemnify, defend, and hold harmless OPS, its employees, subcontractors, and agents, against any third-party damages, losses, liabilities, taxes, tariffs, settlements, or expenses (including, without limitation, costs, and attorneys' fees), in connection with any claim or action that arises from an alleged violation of the foregoing or otherwise from the Client Materials, Client's exercise of Internet electronic commerce, or the Services. OPS and Client will indemnify and hold each other harmless from and against all losses, damages, and/or claims caused by their negligence or failure to act under this Services Agreement. If either party incurs attorneys' fees and court costs due to litigation arising under this Agreement, the prevailing party in such litigation shall be entitled to recover such attorney's fees and court costs from the non-prevailing party. Should any of the Services or Deliverables not comply with OPS's specifications therefor, Client must inform OPS of the deficiency within 30 days of receipt and OPS shall use commercially reasonable efforts to remedy. If compliant Services cannot be provided within a reasonable time, Client's remedy shall be to terminate this Agreement. Client understands that any Internet Service Provider (ISP)'s services require a separate contract with that ISP. Client agrees to

select an ISP that allows OPS full access to its Web site and a cgi-bin directory via FTP. Due to conditions beyond its control, OPS does not warrant that the operation of the Deliverables, including any portion of Client's Web site, will be uninterrupted or error-free. Any warranties, indemnities, guarantees, and representations, express or implied, are specifically disclaimed, including, but not limited to, any warranty of non-infringement, merchantability, title, or fitness for a particular purpose and implied warranties arising from course of dealing or performance, except to the extent that such disclaimers are held to be legally invalid. OPS also disclaims any warranty regarding any benefit Client might obtain from the Services, and the operation or appearance or interaction of the Deliverables with Client's web site.

LIMITATION OF LIABILITY

AS ALL DELIVERABLES PROVIDED HEREUNDER SHALL BE BASED ON CLIENT'S CONTENT, SPECIFICATIONS AND MATERIALS, ALL OPS SERVICES AND DELIVERABLES ARE PROVIDED "AS IS". IN NO EVENT SHALL OPS OR CLIENT BE LIABLE FOR LOSS OF BUSINESS OR BUSINESS OPPORTUNITIES, LOSS OF USE OR OF DATA, OR FOR ANY EXEMPLARY, PUNITIVE, INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES, INCLUDING BUSINESS INTERRUPTION OR LOSS OF PROFITS (EXCEPT IN THE CASE OF NONPAYMENT), EVEN IF IT HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES OR LIABILITY, WHETHER UNDER THIS AGREEMENT OR OTHERWISE, IN WHICH ANY LEGAL OR EQUITABLE ACTION MAY BE BROUGHT. OPS SHALL IN NO EVENT BE LIABLE HEREUNDER FOR DAMAGES EXCEEDING THE FEES PAID BY CLIENT FOR THE SERVICES THAT DIRECTLY GAVE RISE TO SUCH DAMAGES.

MISCELLANEOUS

All Sections of this Agreement that by their nature should survive termination or expiration will survive, including, without limitation, accrued rights to payment, confidentiality obligations, warranty disclaimers, and limitations of liability. Except for payment obligations, neither Party shall be responsible for any failure to perform due to unforeseen, non-commercial circumstances beyond its reasonable control, including but not limited to acts of God, war, embargoes, fire, floods, terrorist attacks, earthquakes, accidents, strikes, sickness, computer viruses, or the like. In the event of any such delay, any period of time for action by said Party may be deferred for a period sufficient to resume normal business activities. No agency, partnership, joint venture, or employment is created as a result of this Agreement and Client does not have any authority to bind OPS in any respect. OPS shall have the right to use third parties in performance of the Services and, for purposes of this Agreement, all references to OPS shall be deemed to include such third parties/subcontractors. This Agreement is the complete and exclusive statement of the mutual understanding of the Parties and supersedes and cancels all previous written and oral agreements, communications, proposals, and other understandings related to the subject matter of this Agreement. All waivers and modifications must be in writing signed by both Parties in ink, except as otherwise provided. The Parties expressly agree that any pre-printed or other terms on any purchase order, request for proposal, or other document shall have no force or effect, even if signed by the Parties after the date hereof. If a court of competent jurisdiction determines as a part of a final non-appealable judgment that any provision of this Agreement is illegal or otherwise unenforceable, it will be limited to the minimum extent necessary so that this Agreement will otherwise remain in full force and effect. Any notice under this Agreement will be in writing and will be deemed to have been duly served the day after it is sent, if sent by next day commercial courier delivery (e.g., Federal Express). The Parties have read this Agreement and had the opportunity to consult with their legal advisors. It will be fairly interpreted in accordance with its terms and without any strict construction against either Party. From time to time, governments enact laws and levy taxes and tariffs affecting Internet electronic commerce. Client agrees that it is solely responsible for complying with said laws, taxes, and tariffs, and will hold harmless, protect, and defend OPS and its subcontractors from any claim, suit, penalty, tax or tariff arising therefrom. No failure or delay on the part of a Party in exercising any right, power or remedy shall operate as a waiver thereof; nor shall any single or partial exercise preclude any other or further exercise thereof or the exercise of any other right, power or remedy hereunder. This Agreement and all transactions hereunder shall be governed in all respects by the laws of the State of California, without regard to either its conflicts or choice of laws rules or the application of the United Nations Convention on Contracts for the International Sale of Goods. In any action to enforce rights under this Agreement, the prevailing party may recover its reasonable costs and attorneys' fees. This Agreement may be executed in counterparts, each of which will be deemed to be an original, and each of which alone and all of which together, shall constitute one instrument. In making proof of this Agreement, it is only necessary to produce or account for the counterpart signed by the Party against whom this Agreement is to be enforced. A facsimile or photocopy thereof of any autograph is deemed an original signature, and the fax/copy shall be an original counterpart. The signatures on the Proposal evidence that the Parties agree to these Terms.

Coversheet

Approval of Sage Intacct Accounting Service Contract (Renewal)

Section: XII. Business/Financial Services
Item: D. Approval of Sage Intacct Accounting Service Contract (Renewal)
Purpose: Vote
Submitted by:
Related Material: Sage Intacct-Excel_Academy_-_Renewal.pdf

BACKGROUND:

Sage Intacct Accounting Service is a streamlined, paperless solution for managing accounting and reporting tasks utilized by Excel Academy Charter Schools and other charter schools since 2020. Its modular design offers essential financial modules such as General Ledger, Accounts Payable, Accounts Receivable, Cash Management, and overall entity administration. Acting as the central repository, it meticulously records and tracks all financial transactions for the schools.

In light of the closure of the Collaborative Charter Services Organization, additional business licenses are necessary for the accounting staff to continue processing accounting reports and functions effectively. Thus, we propose renewing this program for the fiscal year 2024-25 for \$48,643.20, representing a decrease of \$5,928.60 from last year.

RECOMMENDATION:

It is recommended that the Board of Directors approve the renewal of the Sage Intacct for accounting software services not exceeding \$48,643.20.

Ryan Cook
 Sage Intacct, Inc.
 300 Park Ave, Floor Suite 1400
 San Jose, CA 95110
 (408) 878-0900



Date: 28-Mar-2024
Offer Expires: 12-Apr-2024
Quote #: Q-537635

Renewal Order Schedule

Prepared For:

Name: Joe Sorrera
Company: Excel Academy
Address: 1 Technology Drive, I-811
 Irvine, CA 92618
Phone: (949) 387-7822
Email: jsorrera@excelacademy.education

Bill To:

Name: Joe Sorrera
Company: Excel Academy
Address: 1 Technology Drive, I-811
 Irvine, CA 92618
Phone: (949) 387-7822
Email: jsorrera@excelacademy.education

Subscription Term Length: 12 (months)

Subscription Period: 15-Apr-2024 through 14-Apr-2025

Subscription Invoicing: Annual subscription fees begin on the start date of your paid subscription period, with such fees invoiced annually at the beginning of each paid subscription period.

Subscription Payment Terms: Net 30 from date of invoice.

Products

Sage Intacct Services

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage Intacct Financial Management (for a Single Business Entity)	Sage Intacct Financial Management includes the following: General Ledger, Cash Management, Purchase Order, Accounts Payable, Order Entry, Accounts Receivable, Standard Reports, Dashboard, and Customization Services.	1.00	6,840.00	0.00	6,840.00
User License - Business User	Users with unlimited access rights to all applications. Can be restricted based on permissions assigned by an Administrator.	6.00	3,480.00	382.80	18,583.20
Sage Intacct Buy With Confidence Program	The Sage Intacct Buy With Confidence program includes guaranteed system uptime and disaster recovery for the Sage Intacct Services. Details of the Buy With Confidence program, including the specific Sage Intacct Services in scope and our service level commitments, are available at www.sage.com/us/legal/sage-intacct/sla/ .	1.00	0.00	0.00	0.00

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage Intacct Application Hosting, Infrastructure, and Security Services	Hosting of the Sage Intacct Services at a secure top tier data center, and disaster recovery services at a separate secure data center in a different geographic locale, described in our Documentation. Additionally, data is backed up to a secondary data center.	1.00	0.00	0.00	0.00
Sage Intacct Essential Support	Essential Support is included for all direct customers as a part of your Sage Intacct subscription. Support hours are Monday to Friday, 6am to 6pm (Sage local time). For P1 cases, support is available after-hours and during local holidays. Support may be accessed online or by phone for two (2) designated support users; those users will provide first level support to your other users. All submitted cases will receive an acknowledgement through case comments, email notification, or phone call as follows: P1, within 1 business hour; P2, within 4 business hours; and P3, within 8 business hours. Essential Support also gives you direct access to the Sage Intacct Customer Community – a path to submit cases, check the status of cases, and search our comprehensive knowledgebase for answers to questions.	1.00	0.00	0.00	0.00
Sage Intacct Platform Services - Standard	Sage Intacct Platform Services - Standard includes the ability to deploy up to 2 applications on the Sage Intacct Platform with up to 10 custom objects and 10,000 custom records. This SKU is the minimum purchase required for the deployment of any Sage Intacct Marketplace Partner applications or other third-party applications.	1.00	0.00	0.00	0.00
Sage Intacct Employee User 10 Pack	Ten (10) employee user pack with limited access rights which include: read only access to the Dashboard; ability to enter/approve expense reports, timesheets and/or purchase requisitions. Also includes read only access to any additional applications built on the Sage Intacct Platform.	1.00	1,860.00	0.00	1,860.00
Sage Intacct Nonprofit Spend Management	Sage Intacct Nonprofit Spend Management enables organizations to prevent expenditures beyond committed resources. Configuration can warn of or prevent overspending. Provides insight and controls to deliver on mission and commitment.	1.00	2,700.00	0.00	2,700.00
Sage Intacct Grants Tracking and Billing	Grants Tracking and Billing allows you to create records with descriptive elements and tag select financial transactions with specific grant information for reimbursement request generation, invoicing if needed, analysis, and reporting. Allows for resource skill and certification tracking, resource analysis and assignment, utilization and forecasting. Includes Basic Project tracking, Sage Intelligent Time for AI-powered web and mobile timekeeping with suggested time entries and Time & Expense.	1.00	8,400.00	0.00	8,400.00
Each Additional Business Entity	A business entity is an independent balancing set of accounting books with tax reporting capabilities.	1.00	840.00	420.00	420.00

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage Intacct API Performance Tier 1	API transactions for modules of the Sage Intacct Services, FinTech partners that we recommend to you, and Third-Party Services that we resell to you on our Order Schedules are included at no additional cost. Under Performance Tier 1 for Sage Intacct, API transactions for any custom integrations, ETL integrations with our Marketplace Partners, and partners that exit our Marketplace Partner program require a Web Services - Developer License and are also included at no additional cost until the number of API transactions exceed 100,000 API transactions per month. Monthly overage fees will apply if you exceed this use. You may upgrade to a higher tier at any time, but once you upgrade you may not downgrade to a lower tier until the next annual subscription period.	1.00	0.00	0.00	0.00
Sage Intacct User-Defined Dimensions Base Package	Using user-defined dimensions, you can create additional dimensions to help track and report on transactions in Sage Intacct. This SKU enables you to create up to 3 user-defined dimensions.	1.00	12,900.00	12,900.00	0.00
Sage Intacct Services Total:					USD 38,803.20

Sage Intacct Budgeting and Planning Services

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage Intacct Planning - License	Includes the ability to create and manage budgets, manage what-if scenarios, create versions, and collaborate across user types.	1.00	8,520.00	0.00	8,520.00
Sage Intacct Planning Integration	Includes the ability to integrate Budgeting and Planning data with Sage Intacct.	1.00	0.00	0.00	0.00
Sage Intacct Planning - Creator	Includes the ability to create, edit, and delete budgets, including versions and what-if scenarios. Creator user can manage permissions and security for all other user types and has full rights to create and manage centralized calculations.	1.00	1,320.00	0.00	1,320.00
Sage Intacct Budgeting and Planning Services Total:					USD 9,840.00

One-Time and Other Charges

Product Name	Description	Quantity	Term List Price	Unit Disc.	Total Price
Sage Intacct API Overage	If you conduct more monthly API transactions than the amount included in your performance tier, then the following overage fees apply to each API transaction you conduct over those limits. The overage fees for API transactions are calculated here per pack of 10 API transactions and will be billed on a monthly basis.	0.00	0.15		0.00
One-Time and Other Charges Total:					USD 0.00

Grand Total: USD 48,643.20

TERMS:

This Order Schedule is subject to the Agreement between Sage Intacct, Inc. and Excel Academy with effective date 29-Mar-2023, inclusive of any subsequent modifications, including as set forth at <https://www.sageintacct.com/customer-terms-us/tos>. All terms not otherwise defined herein shall have the meaning ascribed to them in the Agreement. Prices shown above do not include any taxes that may apply.

IN WITNESS WHEREOF, the parties hereto have caused this agreement to be executed by their duly authorized officers or representatives, either by signature below or by electronic signature through DocuSign.

Excel Academy

Sage Intacct, Inc.

DocuSigned by:
Joe Sorreera
BFE68E85EEA546B...

DocuSigned by:
James Romero
B5941FC74C5C41B...

(Authorized Signature)

(Authorized Signature)

Joe Sorreera

James Romero

Director of Business Services

Vertical Manager, NFP

(Printed Name and Title)

(Printed Name and Title)

3/29/2024 | 8:34 AM PDT

3/29/2024 | 11:13 AM PDT

(Signature Date)

(Signature Date)

jsorreera@excelacademy.education

james.romero@sage.com

Exhibit A

Additional Terms and Conditions

The following terms are added to, and in the event of a conflict prevail over, the Terms:

- *The Buy With Confidence Program and any agreement between the parties concerning the Health Insurance Portability and Accountability Act (HIPAA), if any, shall not apply to the Sage Intacct Planning Services.*
- Sage Intacct Financial Management includes up to two hundred (200) bank account connections through bank feeds. Bank feeds provide electronic access to thousands of financial institutions for bank reconciliations and matching payments to invoices.

Coversheet

Approval of the Stampli Contract (Renewal)

Section: XII. Business/Financial Services
Item: E. Approval of the Stampli Contract (Renewal)
Purpose: Vote
Submitted by:
Related Material: Excel Pricing Proposal.pdf

BACKGROUND:

Stampli is a cloud-based accounts payable automation platform designed to streamline invoice management. It uses artificial intelligence (AI) and machine learning (ML) to automate invoice processing, coding, and approvals, increasing efficiency and reducing manual workload.

Stampli allows users to receive, process, and approve invoices in a centralized location. Its AI-powered system can automatically extract invoice data, such as vendor information and line item details, and assign the appropriate general ledger codes for faster and more accurate processing. The system also allows for accessible communication and collaboration between departments involved in the invoice approval process and provides a complete audit trail for tracking purposes.

Stampli integrates with various accounting software, such as QuickBooks, NetSuite, and Sage Intacct, seamlessly transferring invoice and payment data. It also offers mobile access, enabling users to manage invoices.

RECOMMENDATION:

It is recommended that the Board of Directors approve the renewal of the Stampli Accounts Payable software services.

STAMPLI

Pricing Proposal

May 1st, 2024

Pricing

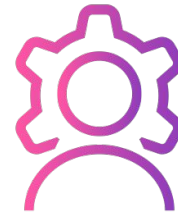
All Plans Include



Implementation

Fast, Easy Setup & Configuration

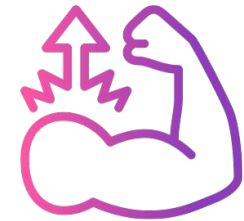
Work with dedicated Customer Success expert to set up Stampli based on your processes.



Training

Fast Adoption by Users

Stampli makes it easy for all users. Training is based on user roles (e.g., AP users, approvers) and offered as needed.



Customer Success

Dedicated to Your Success

Rely on a Customer Success team with expertise in product, AP best practices, and direct accounting experience.

Updated Stampli Pricing:

AP Automation: Updated

AP Automation Monthly Pricing		\$2317
	Platform Fee	\$1,770
	Intacct Connector Fee	\$547
	BASIC USERS	Unlimited*
	ADVANCED USERS	15*
	INVOICE CREDITS	1700**

**Additional Invoices \$1.00 each

*Additional Advanced Users \$25 per

Stampli Pricing

Stampli Direct Pay

Monthly Pricing

Direct Pay Extension		\$250
ACH PAYMENTS An electronic bank-to-bank money transfer processed thru the Automated Clearing House Network, so your vendors see you as the payer.		\$0.55 each**
CHECK PAYMENTS Physical paper checks are printed directly from your bank account, then mailed directly to your vendor.		\$1.55 each*

*Different rates applied for expedited check payments

**Additional fees for ACH returns and chargebacks

Pricing

AP Automation & Direct Pay

Monthly Subscription		\$2567
AP Automation		\$2317
Direct Pay Extension		\$250
Transactional Fees		
ACH Payments		\$0.55 each**
Check Payments		\$1.55 each*

*Different rates applied for expedited check payments

**Additional fees for ACH returns and chargebacks

STAMPLI

Thank You

Coversheet

Approval of Irvine Office Lease with the Irvine Company LLC (Renewal)

Section: XII. Business/Financial Services
Item: F. Approval of Irvine Office Lease with the Irvine Company LLC (Renewal)
Purpose: Vote
Submitted by:
Related Material:
EXCEL ACADEMY CHARTER SCHOOLS-1 Technology Drive, Bldg. I-STE I811-1A2.docx.pdf

BACKGROUND:

The lease agreement for the office at 1 Technology Drive Suite I-11, Irvine, under Irvine Spectrum Portfolio LLC, expires on November 30, 2024. Currently, the School pays \$7,224 monthly, equivalent to \$2.98 per square foot, totaling \$86,688 annually for this lease. Over recent months, EACS staff has actively negotiated with Irvine Company representatives, culminating in a mutually satisfactory arrangement.

Key provisions of the new agreement:

- Lease Term: The lease will now extend until November 30, 2027.
- Essential Abatement Period: EACS will benefit from a Basic Abatement Period from December 1, 2024, to February 28, 2025, amounting to \$1,878.60 monthly or \$5,635.80 for the three months.
- Operating Costs: EACS will assume responsibility for operating costs, estimated at \$0.93 per square foot.

Approving the proposed lease agreement over the current one would result in an estimated saving of approximately \$44,049.24, broken down as follows:

- First Year - \$20,185.56
- Second Year - \$12,804.48
- Third Year - \$11,059.20

RECOMMENDATION:

The Board of Directors is recommended to approve the proposed three-year lease agreement with The Irvine Spectrum Portfolio LLC as presented.

FIRST AMENDMENT TO LEASE

I. PARTIES AND DATE.

This First Amendment to Lease (“**Amendment**”) dated _____, is by and between **IRVINE SPECTRUM PORTFOLIO LLC**, a Delaware limited liability company (“**Landlord**”), and **EXCEL ACADEMY CHARTER SCHOOLS**, a California non-profit corporation (“**Tenant**”).

II. RECITALS.

On September 23, 2019, Landlord and Tenant (formerly known as Community Collaborative Charter School, a California non-profit corporation) entered into a lease (“**Lease**”), for approximately 2,424 rentable square feet of space in a building located at 1 Technology Drive, Bldg. I, Suite I811, Irvine, California (“**Premises**”).

Landlord and Tenant each desire to modify the Lease to extend the Term, adjust the Basic Rent, and make such other modifications as are set forth in “III. MODIFICATIONS” next below.

III. MODIFICATIONS.

A. Basic Lease Provisions. The Basic Lease Provisions are hereby amended as follows:

1. Item 5 is hereby deleted in its entirety and the following substituted in lieu thereof:

“5. **Lease Term:** The Term of this Lease will expire on November 30, 2027.”

2. Item 6 is hereby amended by adding the following:

Months of Term or Period	Monthly Rate Per Square Foot	Monthly Basic Rent
12/1/24 to 11/30/25	\$1.55	\$3,757.20
12/1/25 to 11/30/26	\$1.61	\$3,902.64
12/1/26 to 11/30/27	\$1.67	\$4,048.08

Notwithstanding the above schedule of Basic Rent to the contrary, as long as Tenant is not in Default (as defined in Section 14.1 of the Lease) under the Lease, Tenant will be entitled to an abatement of Basic Rent in the aggregate amount of \$5,635.80 (i.e., \$1,878.60 per month) (the “**First Amendment Abated Basic Rent**”) for the period commencing December 1, 2024 and ending February 28, 2025 (the “**First Amendment Abatement Period**”). In the event of a Default at any time during the portion of the Term extended herein, all First Amendment Abated Basic Rent will immediately become due and payable. The payment by Tenant of the First Amendment Abated Basic Rent in the event of a Default will not limit or affect any of Landlord's other rights, pursuant to the Lease or at law or in equity. Only Basic Rent will be abated during the First Amendment Abatement Period and all other Rent specified in the Lease will remain as due and payable.

3. Effective as of December 1, 2024, Item 7 will be deleted in its entirety and the following substituted in lieu thereof:

“7. **Expense Recovery Period:** Every twelve-month period during the Term (or portion thereof during the first and last Lease years) ending June 30.”

B. Operating Expenses. Effective as of December 1, 2024, **Exhibit B** to the Lease will be deleted in its entirety and **Replacement Exhibit B** attached hereto substituted in lieu thereof.

C. Parking. Notwithstanding anything to the contrary contained in the Lease, Tenant will continue to be entitled to up to 10 parking spaces at no additional charge to Tenant during the Term ending November 30, 2027.

D. Acceptance of Premises. Tenant acknowledges that the lease of the Premises pursuant to this Amendment will be on an “as-is” basis without further obligation on Landlord's part as to improvements whatsoever.

E. Tender. The Lease is hereby amended by adding the following to Section 10.2:

“Tenant will tender any action or proceeding for which it has indemnification obligations under this Lease to its insurer, and request coverage for its indemnity obligations to Landlord. If Tenant is obligated to indemnify Landlord under this Lease, Tenant will accept any tender of defense of any action or proceeding for which it has indemnifications

under this Lease in which Landlord is named or made a party, within 14 days of the tender and will, notwithstanding any allegations of sole negligence or willful misconduct on the part of Landlord, defend Landlord as provided herein until a final determination of Landlord's sole negligence or willful misconduct is made. For purposes of this Section 10.2, "**Landlord**" includes Landlord and Landlord's directors, officers, shareholders, members, agents and employees. Tenant's obligations under this Section 10.2 will survive the termination of this Lease."

F. Tenant's Insurance. The following will be added to the end of **Exhibit D** to the Lease:

4. VENDORS' AND CONTRACTORS' INSURANCE. If Tenant hires any vendor or contractor to complete work on the Premises; Tenant will cause such vendor or contractor to comply with the following insurance requirements:

A. Commercial general liability insurance with coverage limits of not less than \$1,000,000 combined single limit for bodily injury, personal injury, death and property damage liability per occurrence or the current limit carried by vendor or contractor, whichever is greater,

B. Worker's compensation coverage as required by law, including employer's liability coverage with a limit of not less than \$1,000,000 each employee, each accident and each disease.

C. Vendor or Contractor and its insurer(s) providing the insurance coverages described in this Section 4 Parts A, and B above, will waive any and all rights of recovery against Landlord and all entities controlling, controlled by, or under common control with Landlord, together with their respective owners, shareholders, partners, members, divisions, officers, directors, employees, representatives and agents, and all of their respective successors.

D. The commercial general liability insurance policy required in Section 4 Part A, will name Landlord and all entities controlling, controlled by, or under common control with Landlord, together with their respective owners, shareholders, partners, members, divisions, officers, directors, employees, representatives and agents, and all of their respective successors as additional insured for both operations and product completed operations coverage. Such coverage will be primary and non-contributory to any insurance or self-insurance carried by Landlord and all entities controlling, controlled by, or under common control with Landlord.

IV. GENERAL.

A. Effect of Amendment. The Lease will remain in full force and effect and unmodified except to the extent that it is modified by this Amendment.

B. Entire Agreement. This Amendment embodies the entire understanding between Landlord and Tenant with respect to the modifications set forth in "III. MODIFICATIONS" above and can be changed only by a writing signed by Landlord and Tenant.

C. Defined Terms. All words commencing with initial capital letters in this Amendment and defined in the Lease will have the same meaning in this Amendment as in the Lease, unless they are otherwise defined in this Amendment.

D. Corporate and Partnership Authority. If Tenant is a corporation or partnership, or is comprised of either or both of them, each individual executing this Amendment for the corporation or partnership represents that he or she is duly authorized to execute and deliver this Amendment on behalf of the corporation or partnership and that this Amendment is binding upon the corporation or partnership in accordance with its terms.

E. Counterparts: Digital Signatures. If this Amendment is executed in counterparts, each is hereby declared to be an original; all, however, will constitute but one and the same amendment. This Amendment may be executed in one or more counterparts, each of which will constitute an original and all of which will be one and the same agreement. The parties expressly agree that one or each of the parties may execute and deliver this Amendment electronically using a certificate-based electronic signature and delivery software service approved and initiated by Landlord that provides an audit trail and method for authenticating signers (the "**Approved Service**"). The Approved Service will have the same legal effect as a handwritten signature and will be admissible evidence of the parties' mutual intent to be legally bound by this Amendment. The parties declare that they have received all of the information required to be fully aware of the certificate-based electronic signature software process and each party

hereby waives any claim which it may have against the enforceability of this Amendment based on the use of the Approved Service.

F. California Certified Access Specialist Inspection. Pursuant to California Civil Code § 1938, Landlord hereby states that the Premises have not undergone inspection by a Certified Access Specialist (CASp) (defined in California Civil Code § 55.52(a)(3)). Pursuant to Section 1938 of the California Civil Code, Landlord hereby provides the following notification to Tenant: “A Certified Access Specialist (CASp) can inspect the subject premises and determine whether the subject premises comply with all of the applicable construction-related accessibility standards under state law. Although state law does not require a CASp inspection of the subject premises, the commercial property owner or lessor may not prohibit the lessee or tenant from obtaining a CASp inspection of the subject premises for the occupancy or potential occupancy of the lessee or tenant, if requested by the lessee or tenant. The parties shall mutually agree on the arrangements for the time and manner of the CASp inspection, the payment of the fee for the CASp inspection, and the cost of making any repairs necessary to correct violations of construction related accessibility standards within the premises.”

G. Brokers. Article 18 of the Lease is amended to provide that the parties recognize the following parties as the brokers who negotiated this Amendment, and agree that Landlord will be responsible for payment of brokerage commissions to such brokers pursuant to its separate agreements with such brokers: Irvine Management Company (“**Landlord’s Broker**”) is the agent of Landlord exclusively and Lee & Associates / Anaheim, (“**Tenant’s Broker**”) is the agent of Tenant exclusively. By the execution of this Amendment, each of Landlord and Tenant hereby acknowledge and confirm (a) receipt of a copy of a Disclosure Regarding Real Estate Agency Relationship conforming to the requirements of California Civil Code 2079.16, and (b) the agency relationships specified herein, which acknowledgement and confirmation is expressly made for the benefit of Tenant’s Broker. If there is no Tenant’s Broker so identified herein, then such acknowledgement and confirmation is expressly made for the benefit of Landlord’s Broker. By the execution of this Amendment, Landlord and Tenant are executing the confirmation of the agency relationships set forth herein. The warranty and indemnity provisions of Article 18 of the Lease, as amended hereby, will be binding and enforceable in connection with the negotiation of this Amendment.

V. EXECUTION.

Landlord and Tenant executed this Amendment on the date as set forth in “I. PARTIES AND DATE.” above.

LANDLORD:

IRVINE SPECTRUM PORTFOLIO LLC,
a Delaware limited liability company

By:

Steven M. Case
Executive Vice President
Office Properties

By:

Holly McManus
Regional Vice President, Operations
Office Properties

TENANT:

EXCEL ACADEMY CHARTER SCHOOLS,
a California non-profit corporation

By:

Printed Name:
Title:

By:

Printed Name:
Title:

REPLACEMENT EXHIBIT B

OPERATING EXPENSES (Net)

(a) From and after the Commencement Date, Tenant will pay to Landlord, as additional rent, Tenant's Share of all Operating Expenses, as defined in Section (f) below, incurred by Landlord in the operation of the Building and the Project. The term "**Tenant's Share**" means that portion of any Operating Expenses determined by multiplying the cost of such item by a fraction, the numerator of which is the Floor Area of Premises and the denominator of which is the total rentable square footage, as determined from time to time by Landlord, of (i) the Building, for expenses determined by Landlord to benefit or relate substantially to the Building rather than the entire Project, and (ii) all or some of the buildings in the Project, for expenses determined by Landlord to benefit or relate substantially to all or some of the buildings in the Project rather than any specific building. Landlord reserves the right to allocate to the entire Project any Operating Expenses which may benefit or substantially relate to a particular building within the Project in order to maintain greater consistency of Operating Expenses among buildings within the Project. In the event that Landlord determines that the Premises or the Building incur a non-proportional benefit from any expense, or is the non-proportional cause of any such expense, Landlord may allocate a greater percentage of such Operating Expense to the Premises or the Building. In the event that any management and/or overhead fee payable or imposed by Landlord for the management of Tenant's Premises is calculated as a percentage of the rent payable by Tenant and other tenants of Landlord, then the full amount of such management and/or overhead fee which is attributable to the rent paid by Tenant will be additional rent payable by Tenant, in full, provided, however, that Landlord may elect to include such full amount as part of Tenant's Share of Operating Expenses.

(b) Commencing prior to the start of the first full "**Expense Recovery Period**" of the Lease (as defined in Item 7 of the Basic Lease Provisions), and prior to the start of each full or partial Expense Recovery Period thereafter, Landlord will give Tenant a written estimate of the amount of Tenant's Share of Operating Expenses for the applicable Expense Recovery Period. Tenant will pay the estimated amounts to Landlord in equal monthly installments, in advance, concurrently with payments of Basic Rent. If Landlord has not furnished its written estimate for any Expense Recovery Period by the time set forth above, Tenant will continue to pay monthly the estimated Tenant's Share of Operating Expenses in effect during the prior Expense Recovery Period; provided that when the new estimate is delivered to Tenant, Tenant will, at the next monthly payment date, pay any accrued estimated Tenant's Share of Operating Expenses based upon the new estimate. Landlord may from time to time change the Expense Recovery Period to reflect a calendar year or a new fiscal year of Landlord, as applicable, in which event Tenant's Share of Operating Expenses will be equitably prorated for any partial year.

(c) Within 180 days after the end of each Expense Recovery Period, Landlord will furnish to Tenant a statement (a "**Reconciliation Statement**") showing in reasonable detail the actual or prorated Tenant's Share of Operating Expenses incurred by Landlord during such Expense Recovery Period, and the parties will within 30 days thereafter make any payment or allowance necessary to adjust Tenant's estimated payments of Tenant's Share of Operating Expenses, if any, to the actual Tenant's Share of Operating Expenses as shown by the Reconciliation Statement. Any delay or failure by Landlord in delivering any Reconciliation Statement will not constitute a waiver of Landlord's right to require Tenant to pay Tenant's Share of Operating Expenses pursuant hereto. Any amount due Tenant will be credited against installments next coming due under this **Exhibit B**, and any deficiency will be paid by Tenant together with the next installment. Should Tenant fail to object in writing to Landlord's determination of Tenant's Share of Operating Expenses within 60 days following delivery of Landlord's Reconciliation Statement, Landlord's determination of Tenant's Share of Operating Expenses for the applicable Expense Recovery Period will be conclusive and binding on Tenant for all purposes and any future claims by Tenant to the contrary will be barred.

(d) Even though this Lease has terminated and the Tenant has vacated the Premises, when the final determination is made of Tenant's Share of Operating Expenses for the Expense Recovery Period in which this Lease terminates, Tenant will within 30 days of written notice pay the entire increase over the estimated Tenant's Share of Operating Expenses already paid. Conversely, any overpayment by Tenant will be rebated by Landlord to Tenant not later than 30 days after such final determination. However, in lieu thereof, Landlord may deliver a reasonable estimate of the anticipated reconciliation amount to Tenant prior to the Expiration Date of the Term, in which event the appropriate party will fund the amount by the Expiration Date.

(e) If, at any time during any Expense Recovery Period, any one or more of the Operating Expenses are increased to a rate(s) or amount(s) in excess of the rate(s) or amount(s) used in calculating the estimated Tenant's Share of Operating Expenses for the year, then the estimate of Tenant's Share of Operating Expenses may be increased by written notice from Landlord for the month in which such rate(s) or amount(s) becomes effective and for all succeeding months by an amount equal to the estimated amount of Tenant's Share of the increase. Landlord will give Tenant written notice of the amount or estimated amount of the increase, the month in which the increase will become effective, Tenant's Share thereof and the months for which the payments are due. Tenant will pay the increase to Landlord as part of the Tenant's monthly payments of estimated expenses as provided in paragraph (b) above, commencing with the month in which effective.

(f) The term “**Operating Expenses**” will mean and include all Project Costs, as defined in Section (g) below, and Property Taxes, as defined in Section (h) below.

(g) The term “**Project Costs**” will mean all expenses of operation, management, repair, replacement and maintenance of the Building and the Project, including without limitation all Common Areas (as defined in Section 6.2 of the Lease), and will include the following charges by way of illustration but not limitation: water and sewer charges; insurance premiums, deductibles, or reasonable premium equivalents or deductible equivalents should Landlord elect to self-insure any risk that Landlord is authorized to insure hereunder; license, permit, and inspection fees; light; power; window washing; trash pickup; janitorial services to any interior Common Areas; heating, ventilating and air conditioning; supplies; materials; equipment; tools; reasonable fees for consulting services; access control/security costs, inclusive of the reasonable cost of improvements made to enhance access control systems and procedures; establishment of reasonable reserves for replacement of the roof of the Building; costs incurred in connection with compliance with any laws or changes in laws applicable to the Building or the Project; the cost of any capital improvements or replacements (other than tenant improvements for specific tenants) to the extent of the amortized amount thereof over the useful life of such capital improvements or replacements (or, if such capital improvements or replacements are anticipated to achieve a cost savings as to the Operating Expenses, any shorter estimated period of time over which the cost of the capital improvements or replacements would be recovered from the estimated cost savings) calculated at a market cost of funds, all as determined by Landlord, for each year of useful life or shorter recovery period of such capital expenditure whether such capital expenditure occurs during or prior to the Term; costs associated with the maintenance of an air conditioning, heating and ventilation service agreement, and maintenance of any communications or networked data transmission equipment, conduit, cabling, wiring and related telecommunications facilitating automation and control systems, remote telecommunication or data transmission infrastructure within the Building and/or the Project, and any other maintenance, repair and replacement costs associated with such infrastructure; capital costs associated with a requirement related to demands on utilities by Project tenants, including without limitation the cost to obtain additional voice, data and modem connections; labor; reasonably allocated wages and salaries, fringe benefits, and payroll taxes for administrative and other personnel directly applicable to the Building and/or Project, including both Landlord’s personnel and outside personnel; any expense incurred pursuant to Sections 6.1, 6.2, and 7.2 and **Exhibits C** and **F** of the Lease; and reasonable overhead and/or management fees for the professional operation of the Project. It is understood and agreed that Project Costs may include competitive charges for direct services (including, without limitation, management and/or operations services) provided by any subsidiary, division or affiliate of Landlord.

(h) The term “**Property Taxes**” will include any form of federal, state, county or local government or municipal taxes, fees, charges or other impositions of every kind (whether general, special, ordinary or extraordinary) related to the ownership, leasing or operation of the Premises, Building or Project, including without limitation, the following: (i) all real estate taxes or personal property taxes levied against the Premises, the Building or Project, as such property taxes may be reassessed from time to time; and (ii) other taxes, charges and assessments which are levied with respect to this Lease or to the Building and/or the Project, and any improvements, fixtures and equipment and other property of Landlord located in the Building and/or the Project, (iii) all assessments and fees for public improvements, services, and facilities and impacts thereon, including without limitation arising out of any Community Facilities Districts, “Mello Roos” districts, similar assessment districts, and any traffic impact mitigation assessments or fees; (iv) any tax, surcharge or assessment which will be levied in addition to or in lieu of real estate or personal property taxes, and (v) taxes based on the receipt of rent (including gross receipts or sales taxes applicable to the receipt of rent), and (vi) costs and expenses incurred in contesting the amount or validity of any Property Tax by appropriate proceedings. Notwithstanding the foregoing, general net income or franchise taxes imposed against Landlord will be excluded.

Coversheet

Approval of Curriculum Associates Agreement for i-Ready Assessment for 2024-25 (Renewal)

Section: XIII. Education Services
Item: A. Approval of Curriculum Associates Agreement for i-Ready Assessment for 2024-25 (Renewal)
Purpose: Vote
Submitted by:
Related Material: EACS Curriculum Associates Agreement.pdf

BACKGROUND:

i-Ready is Excel Academy's internal local benchmark assessment offered through Curriculum Associates in math and reading. This annual contract includes the diagnostic assessment for all K-11 grade students as well as professional development for school staff provided by the i-Ready service provider. The professional development will help instruct the teachers in the use and resources of i-Ready. The diagnostic score reports are used to monitor student progress, and provide students with the necessary resources, interventions, and support if they are falling below grade level.

Curriculum Associates®

Prepared For:

Jennifer Craig
Excel Academy
1 Technology Dr Ste i-811,
Irvine, CA 92618

4/23/2024

Dear Jennifer Craig,

Thank you for requesting a price quote from Curriculum Associates. The chart below provides a summary of the products and/or services included. If you have any questions or would like any changes, please contact us.

Implementation Starting: 2024-2025 Quote ID: 364765.2 Quote Valid through: 12/31/2024

Product	Net Price
i-Ready	\$33,820.00
Professional Learning	\$600.00
Shipping/Tax/Other:	\$0.00
Total:	\$34,420.00

Thank you again for your interest in Curriculum Associates.

Sincerely

Kathryn Oxhorn
(561) 632-7785
koxhorn@cainc.com

Please submit this quote with your purchase order

Curriculum Associates®

Quote ID: 364765.2 Date: 4/23/2024 Quote Valid through: 12/31/2024

Prepared For:
 Jennifer Craig
 Excel Academy
 1 Technology Dr Ste i-811,
 Irvine, CA 92618
 jcraig@excelacademy.education
 (949) 387-7822

Your Representative:
 Kathryn Oxhorn
 (561) 632-7785
 koxhorn@cainc.com

i-Ready

Product Name	Item #	Qty	Net Price	Total
i-Ready Assessment and Personalized Instruction Math and Reading Site License 1201 or more Students 1 Year	15006.0	1	\$33,820.00	\$33,820.00
i-Ready Subtotal:				\$33,820.00

Professional Learning

Product Name	Item #	Qty	Net Price	Total
Professional Learning Webinar (90 minutes) AY 24-25	38567.0	1	\$600.00	\$600.00
Professional Learning Subtotal:				\$600.00

Total

List Total:	\$34,420.00
Savings:	\$0.00
Merchandise Total:	\$34,420.00
Voucher/Credit:	\$0.00
Estimated Tax:	\$0.00
Estimated Shipping:	\$0.00
Total:	\$34,420.00

Special Notes

All i-Ready purchases require professional learning.

F.O.B.: N. Billerica, MA 01862
 Shipping: Shipping based on MDSE total
 Terms: Net 30 days, pending credit approval
 Fed. ID: #26-3954988

Please submit this quote with your purchase order

N1

Curriculum Associates®

Information on Professional Learning Sessions and COVID-19

Protecting the health and safety of the educators we serve and their students, as well as the health and safety of our employees, is of paramount importance to Curriculum Associates. While it is our preference to deliver PL sessions in person, circumstances related to COVID-19 may require us to provide sessions virtually instead. Curriculum Associates' policy is to only provide PL sessions in person where one of our employees can reach the session site by car and where adequate safety measures are in place to protect the health of our session leaders and participants. Curriculum Associates reserves the right to switch any session from in-person to virtual if we cannot reach a session site by car, if adequate safety measures cannot be put in place, or if Curriculum Associates determines that it would otherwise put its employees at risk to provide an in-person session.

If your school or district will not permit visitors at the time of a scheduled session, Curriculum Associates would be happy to provide an equivalent live, virtual session via videoconference. Similarly, Curriculum Associates will comply with your school or district's health and safety requirements regarding on-site visitors if we are given adequate advance notice. Our PL Operations team will work with school or district personnel to hold sessions in a manner that protects the safety of educators and your school community as well as Curriculum Associates employees.

We are pleased to be able to serve you in these challenging times and look forward to providing productive learning sessions to your staff. Any questions regarding scheduling in-person or virtual training sessions should be directed to pdoperations@cainc.com.

Curriculum Associates®

Placing an Order

Email: Orders@cainc.com

Fax: 1-800-366-1158

Mail:

ATTN: CUSTOMER SERVICE DEPT.

Curriculum Associates LLC

153 Rangeway Rd

North Billerica, MA 01862-2013

Please visit CurriculumAssociates.com for more information about placing orders or contact CA's customer service department (1-800-225-0248) and reference quote number for questions.

Please attach quote to all signed purchase orders.

If tax exempt, please submit a valid exemption certificate with PO and quote in order to avoid processing delays. Exemption certificates can also be submitted to exempt@cainc.com.

Shipping Policy

Unless otherwise noted, shipping costs are calculated as follows:

Order Amount	Freight Amount
\$74.99 or less	Max charge of \$12.75
\$75.00 to \$999.99	12% of order
\$1,000 to \$4,999.99	10% of order

Order Amount	Freight Amount
\$5,000.00 to \$99,999.99	9% of order
\$100,000 and more	7% of order

Please contact your local CA representative or customer service (1-800-225-0248) for expedited shipping rates. The weight limit for an expedited order is 500lbs.

The enhanced shipping and handling services listed below are available upon request subject to the availability of our carrier partners. Please notify us of these delivery requests prior to submitting your PO so that we can include the service on your quote appropriately:

- Interior Location Delivery \$50/shipment location
- White Glove Delivery Service \$350/shipment location

If our carrier partners are unable to deliver to the location instructed on the PO or you need to change the time or location of delivery, one or more of the following fees may be applicable:

- Delivery Address Change \$100/shipment location
- Freight Storage \$150/day/shipment location
- Freight Carrier Redelivery \$100/shipment location

Unless otherwise expressly indicated, the shipping terms for all deliveries is FOB CA's Shipping Point (whether to a CA or third party facility). Risk of loss and title is passed to purchaser upon transfer of the goods to carrier, standard shipping charges (listed above) are added to the invoice or included in the unit price unless otherwise specified.

Supply chain challenges outside of Curriculum Associates' control may impact inventory availability for print product. We recommend submission of purchase orders as soon as possible to help ensure timely delivery.

Payment Terms

Payment terms are as follows:

- With credit approval: Net 30 days
- Without credit approval: payment in full at time of order
- Accounts must be current before subsequent shipments are made

To ensure payment processing is timely and environmentally conscious, CA encourages ACH payments. If you would like to pay via ACH, please request remittance information by emailing AR@cainc.com.

Please send any payment notifications to payments@cainc.com. Credit card payments are only accepted for purchases under \$50,000.

Invoice Receipt Preference

CA is pleased to offer electronic invoice delivery. Electronic invoice delivery allows CA to deliver your invoice in a timely and environmentally friendly manner. To request electronic invoice delivery please contact the CA Accounts Receivable team at invoices@cainc.com or by fax (1-800-366-1158). Please reference your quote number, provide a valid email address where the invoice should be directed, and indicate you would like to opt into electronic invoice delivery.

Terms of Service

Customer's use of i-Ready® shall be subject to the i-Ready Terms and Conditions of Use, which can be found at i-ready.com/support. Customer's professional-learning sessions will expire two years following the date of your purchase order or the implementation year noted on your quote, whichever comes first and are subject to the Professional Learning Terms of Service, which can be found at i-ready.com/support.

Return Policy

For any non-print products - your subscription may be terminated and you may request a pro-rata refund within 90 days of license start date. After 90 days, your non-print products purchase shall be final and no refunds are available. Except for materials sold on a non-refundable basis, purchaser may return, at purchaser risk and expense, purchased print materials with pre-approval from CA's Customer Service department within 12 months of purchase. Please examine your order upon receipt. Before returning material, call CA's Customer Service department (1-800-225-0248 option 2) for return authorization and documentation. When returning material, please include your return authorization number and the return form that will be provided to you by CA's Return department. We do not accept returns on unused i-Ready or Toolbox licenses®, materials that have been used and/or are not in "saleable condition," and individual components of kits or sets including but not limited to BRIGANCE® Kits, Ready® student and teacher sets, Ready Classroom® student and teacher sets, and Magnetic Reading classroom kits.

Coversheet

Approval of Bright Thinker Service Licenses (Renewal)

Section: XIII. Education Services
Item: B. Approval of Bright Thinker Service Licenses (Renewal)
Purpose: Vote
Submitted by:
Related Material: Excell 24 25 renewal Bright Thinker.pdf

BACKGROUND:

For the past four years, the ETL course options have been growing with the help of Bright Thinker curriculum. The asynchronous platform allows the flexibility for our teachers to create live lessons which supports students who are learning primarily independently from home. Bright Thinker curriculum is A-G and NCAA approved, evenly paced, and works well for a wide range of learners.



ORDER FORM

PO Box 292632
 Lewisville, TX 75029
 Phone 469-464-5420
 EIN #85-1398467

ORDER #: SQ-0487
 DATE: 03/27/2024

BILL TO: **Excel Academy**
 1 Technology Drive Suite I-811
 Irvine, CA 92618

QUANTITY	PRODUUCT	UNIT PRICE	LINE TOTAL
1	Premium Professional Development	\$1,500.00	\$1,500.00
400	Student Seat License - 1 Year	\$200.00	\$80,000.00
	Subtotal		\$81,500.00
	Total		\$81,500.00

- Notes
1. This is for 400 student licenses K-12 for the 24/25 school year.
 2. Any student license over 400 will be invoiced at the discounted rate of \$200 per student license.
 3. PD will include any implementation/ teacher refresher training and continued support throughout the year.
 4. Print is available at \$100 per student per course plus tax, shipping and handling. Drop shipping to homes is available.

Signature:

Please Send Invoices to:

Signature _____ Date: _____ Name _____

Title _____ Date: _____ Email _____

Bright Thinker Contact

Name _____ Signature _____ Date: _____

TERMS AND CONDITIONS

Execution of this Order Form shall bind the signatories below (the "Parties") to the BRIGHTTHINKERTM License Agreement and the BRIGHTTHINKERTM Privacy Policy, the terms and conditions of which are located at <https://brightthinker.com/legal-disclosures/>, as may be amended, supplemented, or changed from time to time without notice. In the event of a conflict, the provisions of the BRIGHTTHINKERTM License Agreement shall supersede the Order Form or the BRIGHTTHINKERTM Privacy Policy.

Coversheet

Approval of Bright Thinker Services Licenses True Up

Section: XIII. Education Services
Item: C. Approval of Bright Thinker Services Licenses True Up
Purpose: Vote
Submitted by:
Related Material: Bright Thinker True Up.pdf

BACKGROUND:

At the onset of the 2023-2024 school year, 300 Bright Thinker licenses were procured. However, throughout the year, a total of 402 licenses were utilized, with 249 allocated to CS and 153 to East. This invoice addresses the acquisition of an additional 102 licenses required for the current year, totaling \$20,400.00 at a rate of \$200 per license.

RECOMMENDATION:

It is recommended that the Board approve the Bright Thinker License True Up as presented.



INVOICE

PO Box 292632
 Lewisville, TX 75029
 Phone 469-464-5420

INVOICE #: **SINV9166**
 DATE: **03/29/2024**

BILL TO: **Excel Academy**
 1 Technology Drive Suite I-811
 Irvine, CA 92618

PURCHASE ORDER #	SALES TERMS	DUE DATE
2023-2024 School Year True up Additional Licenses 03/25/24	Net 30 Day	04/28/2024

ITEM #	DESCRIPTION	UNIT	QTY	UNIT PRICE	AMOUNT
BTD-ST1	Bright Thinker Online - Student Seat License (1-Year)	Each	102	\$200.00	\$20,400.00
				Subtotal	\$20,400.00
				Sales Tax	\$0.00
				Total	\$20,400.00

All invoices over 30 days are subject to a 10% late fee

Make all checks payable to Bright Thinker

EIN#85-1398467

Thank you for your business!



Invoice Date: 03/29/2024 Terms: Net 30 Due Date: 04/28/2024 Customer ID: CA-3775416

Coversheet

Approval of the Tutor.com (Renewal)

Section: XIII. Education Services
Item: D. Approval of the Tutor.com (Renewal)
Purpose: Vote
Submitted by:
Related Material: Tutor.com Excel 2024 2025 renewal quote 685 (1).pdf

BACKGROUND:

Tutor.com offers on-demand tutoring requests 24/7. The service is affiliated with the Princeton Review and provides additional student resources such as test prep including SAT support. Parents and students may schedule tutoring sessions or log in for more immediate support. There are both asynchronous and synchronous support options with live, whiteboards for visual tutoring. Students may submit all writing assignments including resumes for review. All tutors go through a background check and ongoing review. They are unique in that they provide 1:1 tutoring sessions and record all sessions with a transcript; this provides security and allows students to go back and preview the session.



Price Quote

Date: 4/17/2024
 Quote number: 2
 Opportunity number: 186540

Questions? Call Kelsey Lantz (917-744-2372)
 or email kelsey.lantz@review.com

To:
 Excel Academy Charter District
 1 Technology Drive
 Irvine, CA 92618
 ATTN: Lorrie Wood

Remit to:
 TPR Education LLC / The Princeton Review
 P.O. Box 70403
 Philadelphia, PA 19176-0403

Please include our quote number on your remittance.

Tax ID #45-4924149

Wire Remittance:
 Hanmi Bank
 933 S. Vermont Ave, 2nd Floor
 Los Angeles, CA 90006
 Account #550091961
 ABA Routing #122039399
 SWIFT #HANMUS6L

ACH Remittance:
 Hanmi Bank
 933 S. Vermont Ave, 2nd Floor
 Los Angeles, CA 90006
 Account #550091961
 ABA Rounting #122039399

Item	Quantity	Unit Price	Cost
Tutor.com - Unlimited Tutoring Excel Academy Charter District (August 1, 2024 - July 31, 2025)	685	\$35.00	\$23,975.00

Total: \$23,975.00
Paid/Credited: \$0.00
Due: \$23,975.00

Coversheet

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

Section: XIV. Personnel Services
Item: A. Approval of the Declaration of Need (DON) for Fully Qualified Educators
Purpose: Vote
Submitted by:
Related Material:
San Bernardino DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS.pdf
San Diego DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS.pdf

BACKGROUND:

The Declaration of Need (DON) is the annual form submitted to the California Commission on Teacher Credentialing (CCTC) by county offices of education, public school districts, charter schools, state-wide agencies or non-public schools or agencies.. The updates to the language based on the changes with AB 1505 are now complete and all employing agencies, including charter schools, must comply with the regulation to be eligible to apply for any emergency and/or limited assignment permit restricted to their organization. This form contains the employing agency's estimated number (it is acceptable to overestimate with no penalty) of Emergency Permits (such as Emergency CLADS and BCLADS), Limited Assignments, and Internship Credentials that will be requested during the upcoming school year.

RECOMMENDATION:

It is recommended the Board approve the Declaration of Need for the 2024-25 school year as presented.



State of California
 Commission on Teacher Credentialing
 Certification Division
 1900 Capitol Avenue
 Sacramento, CA 95811-4213

Email: credentials@ctc.ca.gov
 Website: www.ctc.ca.gov

DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS

Original Declaration of Need for year: 2024-25

Revised Declaration of Need for year: _____

FOR SERVICE IN A SCHOOL DISTRICT OR DISTRICT/COUNTY AUTHORIZED CHARTER SCHOOL

Name of District or Charter: Excel Academy Charter School District CDS Code: 36677360139576

Name of County: San Bernardino County CDS Code: 3610363000000

By submitting this annual declaration, the district is certifying the following:

- A diligent search, as defined below, to recruit a fully prepared teacher for the assignment(s) was made
- If a suitable fully prepared teacher is not available to the school district, the district will make a reasonable effort to recruit based on the priority stated below

The governing board/body of the school district or charter school specified above adopted a declaration at a regularly scheduled public meeting held on ___/___/___ certifying that there is an insufficient number of certificated persons who meet the district's specified employment criteria for the position(s) listed on the attached form. The attached form was part of the agenda, and the declaration did NOT appear as part of a consent calendar.

► **Enclose a copy of the board agenda item**

With my signature below, I verify that the item was acted upon favorably by the board. The declaration shall remain in force until June 30, 2025.

Submitted by (Superintendent, Board Secretary, or Designee):

Name Signature Title

Fax Number Telephone Number Date

1 Technology, Suite I 811, Irvine, CA 92618
Mailing Address

E-Mail Address

FOR SERVICE IN A COUNTY OFFICE OF EDUCATION, STATE AGENCY OR NONPUBLIC SCHOOL AGENCY

Name of County NA County CDS Code NA

Name of State Agency NA

Name of NPS/NPA NA County of Location NA

The Superintendent of the County Office of Education or the Director of the State Agency or the Director of the NPS/NPA specified above adopted a declaration on ___/___/___, at least 72 hours following his or her public announcement that such a declaration would be made, certifying that there is an insufficient number of certificated persons who meet the county's, agency's or school's specified employment criteria for the position(s) listed on the attached form.

The declaration shall remain in force until June 30, _____.

► **Enclose a copy of the public announcement**

Submitted by Superintendent, Director, or Designee:

NA

Name	Signature	Title
Fax Number	Telephone Number	Date
Mailing Address		
EMail Address		

► *This declaration must be on file with the Commission on Teacher Credentialing before any emergency permits will be issued for service with the employing agency*

AREAS OF ANTICIPATED NEED FOR FULLY QUALIFIED EDUCATORS

Based on the previous year's actual needs and projections of enrollment, please indicate the number of emergency permits the employing agency estimates it will need in each of the identified areas during the valid period of this Declaration of Need for Fully Qualified Educators. This declaration shall be valid only for the type(s) and subjects(s) identified below.

This declaration must be revised by the employing agency when the total number of emergency permits applied for exceeds the estimate by ten percent. Board approval is required for a revision.

Type of Emergency Permit	Estimated Number Needed
CLAD/English Learner Authorization (applicant already holds teaching credential)	5 _____
Bilingual Authorization (applicant already holds teaching credential)	2 _____
List target language(s) for bilingual authorization: _____	
Resource Specialist	0 _____
Teacher Librarian Services	0 _____
Emergency Transitional Kindergarten (ETK)	2 _____

LIMITED ASSIGNMENT PERMITS

Limited Assignment Permits may only be issued to applicants holding a valid California teaching credential based on a baccalaureate degree and a professional preparation program including student teaching.

Based on the previous year's actual needs and projections of enrollment, please indicate the number of Limited Assignment Permits the employing agency estimates it will need in the following areas. Additionally, for the Single Subject Limited Assignment Permits estimated, please include the authorization(s) which will be requested:

TYPE OF LIMITED ASSIGNMENT PERMIT	ESTIMATED NUMBER NEEDED
Multiple Subject	2
Single Subject	12
Special Education	8
TOTAL	22

Authorizations for Single Subject Limited Assignment Permits

SUBJECT	ESTIMATED NUMBER NEEDED	SUBJECT	ESTIMATED NUMBER NEEDED
Agriculture	0	Mathematics	2
Art	1	Music	1
Business	1	Physical Education	1
Dance	0	Science: Biological Sciences	1
English		Science: Chemistry	1
Foundational-Level Math	1	Science: Geoscience	
Foundational-Level Science	1	Science: Physics	1
Health	0	Social Science	0
Home Economics	0	Theater	1
Industrial & Technology Education	0	World Languages (specify)	0

EFFORTS TO RECRUIT CERTIFIED PERSONNEL

The employing agency declares that it has implemented in policy and practices a process for conducting a diligent search that includes, but is not limited to, distributing job announcements, contacting college and university placement centers, advertising in local newspapers, exploring incentives included in the Teaching as a Priority Block Grant (refer to www.cde.ca.gov for details), participating in state and regional recruitment centers and participating in job fairs in California.

If a suitable fully prepared teacher is not available to the school district, the district made reasonable efforts to recruit an individual for the assignment, in the following order:

- A candidate who qualifies and agrees to participate in an approved internship program in the region of the school district
- An individual who is scheduled to complete initial preparation requirements within six months

EFFORTS TO CERTIFY, ASSIGN, AND DEVELOP FULLY QUALIFIED PERSONNEL

Has your agency established a District Intern program? Yes No

If no, explain. We have been successful in our hiring of fully credentialed staff and support growth in our current staff

Does your agency participate in a Commission-approved college or university internship program? Yes No

If yes, how many interns do you expect to have this year? 0-2

If yes, list each college or university with which you participate in an internship program.
This would depend on the school of the desired candidate. We anticipate if the need arises.

If no, explain why you do not participate in an internship program.



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DECLARATION OF NEED FOR FULLY QUALIFIED EDUCATORS

Original Declaration of Need for year: 2024-25

Revised Declaration of Need for year: _____

FOR SERVICE IN A SCHOOL DISTRICT OR DISTRICT/COUNTY AUTHORIZED CHARTER SCHOOL

Name of District or Charter: Excel Academy Charter School District CDS Code: 37754160139386

Name of County: San Diego County CDS Code: 3710371000000

By submitting this annual declaration, the district is certifying the following:

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Submitted by (Superintendent, Board Secretary, or Designee):

_____ *Name* _____ *Signature* _____ *Title*

_____ *Fax Number* _____ *Telephone Number* _____ *Date*

1 Technology, Suite I 811, Irvine, CA 92618

Mailing Address

_____ *E-Mail Address*

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Name of County NA County CDS Code NA

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Submitted by Superintendent, Director, or Designee:

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Name	Signature	Title
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If yes, how many interns do you expect to have this year? 0-2

If yes, list each college or university with which you participate in an internship program.
This would depend on the school of the desired candidate. We anticipate if the need arises.

If no, explain why you do not participate in an internship program.

Coversheet

Approval of New Board Policies

Section: XV. Policy Development
Item: A. Approval of New Board Policies
Purpose: Vote
Submitted by:
Related Material: EACS - 3035 Designation of Authorized Personnel for Banking.docx.pdf

BUSINESS/NON-INSTRUCTIONAL**3035-EA**

DESIGNATION OF AUTHORIZED PERSONNEL FOR BANKING**Purpose and Scope:**

This policy establishes procedures for designating authorized personnel for banking activities in the event of the school's executive director's incapacity or termination. This policy applies to all banking activities conducted on behalf of Excel Academy Charter Schools (EACS).

Authorized Personnel Designation:

The Executive Director of Excel Academy Charter Schools is currently designated as the primary authorized individual for banking activities. This includes the authority to invest excess funds in certificates of deposits and add, delete, or assign banking authority to other individuals as needed.

Suppose the Executive Director becomes incapacitated or is terminated and unable to fulfill their duties. In that case, the Director of Business Services shall assume the role of the primary authorized individual for all banking activities.

Notification and Documentation:

The Executive Director shall provide written notification to the banks acknowledging the change to the designated authorized personnel for banking activities in the event of an emergency.

Upon assuming the role of the primary authorized individual, the Director of Business Services shall promptly notify the banks of their designation and provide any necessary documentation to verify their authority.

Limitations and Accountability:

The Director of Business Services shall exercise banking authority strictly within the scope of their duties and per applicable laws, regulations, and School policies.

The Director of Business Services shall maintain accurate records of all banking transactions and ensure proper documentation and oversight of financial activities.

Succession Planning:

The Executive Director and Director of Business Services shall establish procedures for identifying and training potential successors to the Director of Business Services to ensure continuity in future changes in personnel or circumstances. Succession planning shall include cross-training and mentoring initiatives to prepare qualified individuals to assume banking authority responsibilities when necessary.

Compliance and Review:

This policy shall comply with all applicable laws, regulations, and School policies governing banking activities and financial management.

The Executive Director and/or Director of Business Services shall periodically review and update this policy to ensure its effectiveness and alignment with organizational objectives.

DESIGNATION OF AUTHORIZED PERSONNEL FOR BANKING

Implementation:

This policy shall take effect upon approval by the Board of Directors of Excel Academy Charter Schools. All relevant stakeholders, including the Executive Director, Director of Business Services, and other staff members involved in banking activities, shall be notified of this policy and provided with appropriate training and guidance.