



## Excel Academy (CA)

### Regular Meeting of the Board of Directors

Published on June 7, 2024 at 5:10 PM PDT

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#### **Date and Time**

Thursday June 13, 2024 at 11:55 AM PDT

#### **Location**

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

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

#### **Zoom Meeting Information:**

**Dial In: +1 669 444 9171**

**Meeting ID: 838 4197 5894**

**URL: <https://us06web.zoom.us/j/83841975894>**

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#### **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.

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

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

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

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

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

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

**Agenda**

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>11:55 AM</b>
<b>A.</b> Call the Meeting to Order		William Hall	1 m
<b>B.</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			
<b>II. Pledge of Allegiance</b>			<b>11:57 AM</b>
<b>A.</b> Led by Board President or designee.		William Hall	1 m
<b>III. Approve/Adopt Agenda</b>			<b>11:58 AM</b>
<b>A.</b> Agenda	Vote	William Hall	1 m
It is recommended the Board of Directors adopt as presented, the agenda for the Regular Board meeting of June 13, 2024.			



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

**IV. Approve Minutes 11:59 AM**

<b>A.</b> Minutes of the Regular Board Meeting held on May 9, 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 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.

**VI. Correspondence/Proposals/Reports 12:00 PM**

<b>A.</b> Excel Academy Year in Review - Presented by Heidi Gasca, Executive Director	Discuss	Heidi Gasca	10 m
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[Year In Review Video](#)

	Purpose	Presenter	Time
<b>VII. Consent</b>			<b>12:10 PM</b>

Items listed under Consent are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent upon the request of any member of the Board, discussed, and acted upon separately.

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

1. Check Register - May 2024
2. Cash Payments - May 2024
3. Approval of Hatch & Cesario Agreement for Legal Services for 2024-2025
4. Approval of Bolton Property & Casualty Insurance Renewal for 2024-2025

**B. Consent - Education Student/Services**

1. Approval of English Learner Master Plan
2. Approval of Care Solace Services Renewal for 2024-25
3. Approval of Excel Academy Charter Schools Comprehensive Injury, Illness and Safety Plan for 2024-25

**C. Consent - Personnel Services**

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report
3. Approval of the Teacher of Record Manual for 2024-2025

<b>D. Consent Items - Policy Development</b>	Vote	1 m
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Approval of existing board policies revised, reviewed, and eliminated by staff for the 2024-2025 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**

3115 - EA General Terms and Conditions of the Purchase Order

Purpose Presenter Time

**4000 Series - Personnel Services**

4145 - EA Professional Development Reimbursement Policy

**5000 Series - Student Services**

- 5010 - EA Educational Records and Student Information Policy
- 5015 - EA Title IX, Harassment, Intimidation, Discrimination, and Bullying Policy
- 5035 - EA Student Freedom of Speech and Expression Policy
- 5050 - EA Academic Integrity Policy
- 5070 - EA Transgender and Gender Nonconforming Student Nondiscrimination Policy
- 5075 - EA Transcripts from Non-Accredited Schools Policy
- 5095 - EA Retention & Acceleration Policy

**6000 Series - Instruction**

- 6010 - EA Independent Study Policy
- 6115 - EA Attendance Policy
- 6210 - EA Graduation Policy

**Board Policies: Reviewed:**

The following policies have been reviewed but have not needed any changes:

**5000 Series - Student Services**

- [5020](#)- EA Suicide Prevention Policy
- [5030](#)- EA Immunization Policy
- [5045](#)- EA Acceptable Use Policy
- [5055](#) - EA Self-Administration of Medication Policy
- [5065](#)- EA Lottery Policy
- [5070](#) - EA Transgender and Gender Nonconforming Student Nondiscrimination Policy
- [5085](#)- EA Communicable Contagious or Infectious Disease Prevention
- [5105](#)- EA Direct Instruction and Supplemental/Administrative Support Policy
- [5110](#)- EA Cell Phones & Other Electronic Signaling Devices Policy
- [5115](#)- EA Pregnant and Parenting Students Policy

**E.** Approve Consent Agenda Vote William Hall 1 m

***Items in the consent agenda are considered routine and will be approved/adopted by a single motion.***

Roll Call Vote:  
William Hall

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

**VIII. Board Governance**

**12:12 PM**

- |           |   |      |             |     |
|-----------|---|------|-------------|-----|
| <b>A.</b> | Approval of the Revised Excel Academy 2024-2025 Board Meeting Calendar & Schedule | Vote | Heidi Gasca | 3 m |
|-----------|---|------|-------------|-----|

It is recommended that the Board approve the Revised Excel Academy 2024-2025 Board Meeting Calendar & Schedule as presented.

**Fiscal Impact:** None

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

**IX. Business/Financial Services**

**12:15 PM**

- |           |   |      |             |     |
|-----------|---|------|-------------|-----|
| <b>A.</b> | Approval of Additional Chromebooks Purchase | Vote | Joe Sorrera | 3 m |
|-----------|---|------|-------------|-----|

It is recommended the Board approve the Approval of Additional Chromebooks Purchase for 2024-2025 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

**Fiscal Impact: \$105,340.64**

Warner (#2053): \$65,312.00

Helendale (#2073): \$40,028.64

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

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

<b>B.</b>	Approval of Instructional Funds Increase for Students for the 2024-25 School Year	Vote	Joe Sorrera	3 m
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It is recommended the Instructional Funds Increase for Students for the 2024-25 School Year for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

**Fiscal Impact: \$417,750.00**

Warner (#2053): \$259,005.00

Helendale (#2073): \$158,745.00

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

<b>X.</b>	<b>Personnel Services</b>			<b>12:21 PM</b>
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<b>A.</b>	Approval of CharterLIFE Benefits (Renewal)	Vote	Megan Anderson	8 m
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It is recommended the Board approve the CharterLIFE Benefits Renewal for 2024-25 for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

**Fiscal Impact: See attached premium rates.**

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

<b>XI.</b>	<b>Policy Development</b>			<b>12:29 PM</b>
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	Purpose	Presenter	Time
<b>A.</b> Approval of New Board Policies	Vote	Joe Sorrera & Megan Anderson	5 m

It is recommended that the Board approve the proposed policies.

**Board Policies: New**

**3000 Series - Business/Non-Instructional**

3040 - EA Investment Policy

**4000 Series - Personnel**

4005 - EA Salary Determination Policy

4135 - EA External County Employment Policy

**5000 Series - Student Services**

5060 - EA Artificial Intelligence Use Policy for Students

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

**XII. Public Hearing**

**12:34 PM**

<b>A.</b> Local Indicators and Local Control & Accountability Plan (LCAP) 2024-25	Discuss	Jenny Craig	8 m
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Education Code Section 47606.5, states that the Governing Board of a charter school shall hold a public hearing as part of the process to adopt the 2024-2025 Local Control and Accountability Plans (LCAP) for Excel Academy Charter School. The first reading of the 2024-2025 LCAPs and the Local Performance Indicator Self-Reflection reports for the California School Dashboard will be presented during the hearing. It is recommended the Board enter into a public hearing regarding the LCAP for 2024-25. During the hearing there will be a presentation on the LCAP for 2024-25.

a. 2024-25 LCAP Plan (Helendale)

	Purpose	Presenter	Time
b. 2024-25 LCAP Plan (Warner)			
Hearing Open: _____ Hearing Closed: _____			
<b>B.</b>	Proposed Budget 2024-2025	Discuss	Joe Sorrera
			10 m

It is recommended the Board enter into a public hearing regarding the Proposed Budget for the 2024-25 school year. During the hearing there will be a presentation on the Proposed Budget for the 2024-25 school year.

- a. 2024-25 Preliminary Budget
- b. 2023-24 Education Protection Account (EPA) Plan Actuals (Helendale)
- c. 2023-24 Education Protection Account (EPA) Plan Actuals (Warner)
- d. 2024-25 Education Protection Account (EPA) Multi-Year Plan (Helendale)
- e. 2024-25 Education Protection Account (EPA) Multi-Year Plan (Warner)
- f. 2024-25 Local Control Funding Formula (LCFF) Budget Overview for Parents (Helendale)
- g. 2024-25 Local Control Funding Formula (LCFF) Budget Overview for Parents (Warner)

Hearing Open: \_\_\_\_\_ Hearing Closed: \_\_\_\_\_

**XIII. Calendar**

The next scheduled Regular Board Meeting will be held on June 20, 2024.

**XIV. Comments 12:52 PM**

- A.** Board Comments 5 m
- B.** CEO Comments 5 m

**XV. Closing Items 1:02 PM**

- A.** Adjourn Meeting Vote
- Roll Call Vote:
- William Hall
- Michael Humphrey
- Steve Fraire
- Susan Houle
- Larry Alvarado

	Purpose	Presenter	Time	
Moved by _____	Seconded by _____	Ayes _____	Nays _____	Absent _____

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**FOR MORE INFORMATION**

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



# Coversheet

## Minutes of the Regular Board Meeting held on May 9, 2024

**Section:** IV. Approve Minutes  
**Item:** A. Minutes of the Regular Board Meeting held on May 9, 2024  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for Regular Meeting of the Board of Directors on May 9, 2024

APPROVED



## Excel Academy (CA)

# Minutes

## Regular Meeting of the Board of Directors

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### Date and Time

Thursday May 9, 2024 at 12:00 PM

### Location

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

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

### Zoom Meeting Information:

Dial In: +1 669 444 9171 US

Meeting ID: 865 4142 3299

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

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### 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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#### **Directors Present**

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

#### **Directors Absent**

*None*

#### **Guests Present**

L. Hansen

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## **I. Opening Items**

### **A. Call the Meeting to Order**

W. Hall called a meeting of the board of directors of Excel Academy (CA) to order on Thursday May 9, 2024 at 12:23 PM.

### **B. Record Attendance**

## **II. Approve/Adopt Agenda**

### **A. Agenda**

S. Houle 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 March 14, 2024**

S. Houle made a motion to approve the minutes from Regular Meeting of the Board of Directors on 03-14-24.

L. Alvarado seconded the motion.

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

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

S. Houle made a motion to approve the minutes from Board of Directors Study Session on 04-11-24.

S. Fraire 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.

S. Houle seconded the motion.

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

**V. Reconvene Regular Meeting**

**A. Report out any action taken in closed session.**

The Board approved the positive evaluation of the Executive Director, Heidi Gasca.

**VI. Correspondence/Proposals/Reports**

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

- Heidi updated on various school activities and developments:
  - The registration of 230 new students for the upcoming school year, with ongoing efforts to ensure they are well integrated and informed over the summer.
  - The implementation of the Lexia literacy program for first and second graders in April.
  - The successful introduction of GATE testing, with a waitlist of students eager to participate.
  - State testing preparation sessions have been effective in enhancing student performance.
  - The celebration of the school's second annual prom, highlighted by a balloon arch and a joyous atmosphere.
  - Continued success of Outdoor Classrooms organized by community liaisons across nine regions, which are well-received by students.
  - A notable community event where students sold handmade items, which Heidi personally supported by purchasing bracelets.
  - Ongoing professional development across various areas, with mention of the recent CCFA conference and a successful theater arts performance.

- The upcoming staff celebration on June 12 and a spring celebration for students on May 24.

These highlights reflect a strong focus on community engagement, educational innovation, and recognition of staff and student achievements.

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

The principals detailed their collaborative efforts and achievements across elementary and secondary education for the year. A key initiative, the Parent PowerUp conference, successfully engaged parents with educational strategies and mental well-being support while simultaneously providing enriching activities for students, such as a visit from a fire marshal and a dance session led by a professional.

Community building was emphasized, with successful monthly events like a bowling and ice cream social, and regular in-person meetings for staff which included team-building exercises. These efforts were aimed at strengthening the sense of community within the school.

Academically, the principals focused on enriching learning experiences through the GATE program, a curated curriculum collage for hands-on learning, and intensive reading programs that include a new reading class and a dyslexia screener process, which is ahead of state requirements. They have also focused on aligning educational support between different tiers of student needs, improving overall academic support.

For the upcoming year, new initiatives include the introduction of elementary grade-level homerooms to further community feeling among students and a focus on enhancing writing skills. Additionally, they welcomed two new counselors who have contributed significantly, developing resources like the Counselor Corner website for college and career preparation.

Overall, the review highlighted a year of building community, enhancing academic programs, and focusing on professional development, setting a positive trajectory for future growth and development in the school.

**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.

L. Alvarado seconded the motion.

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

**VIII. Business/Financial Services**

**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)**

S. Houle made a motion to Bill Hall.

S. Fraire seconded the motion.

This board item involves a recommendation for the board to approve and receive the federal and California tax returns for the fiscal year ending June 30, 2023. These tax returns were prepared by the independent audit firm CLA and are part of the annual compliance obligations to the IRS and the Franchise Tax Board for the organization, which operates as a nonprofit.

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

**B. Approval of California Charter Schools Association (CCSA) Membership for 2024-25 (Renewal)**

S. Houle made a motion to Bill Hall.

S. Fraire seconded the motion.

This board item requests approval for continued affiliation with CCSA, a statewide advocacy network that offers substantial support including professional development, legal assistance, and renewal guidance and training to the team. The item highlights the significant value of this investment in professional development, despite its considerable cost. During the board discussion, there were no questions from most members, except for Steve who inquired whether the cost is based on enrollment, to which the answer was affirmative.

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

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

S. Fraire made a motion to Bill Hall.

M. Humphrey seconded the motion.

This board item presents a proposal for the board to approve the renewal of a purchasing software service by OPS, at a cost of \$24,947.19. The software aids teachers, staff, and parents in managing and placing orders using instructional funds and other school resources. The proposed agreement covers a one-year period, from July 1, 2024, to June 30, 2025.

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

**D.**

### **Approval of Sage Intacct Accounting Service Contract (Renewal)**

S. Houle made a motion to Bill Hall.

S. Fraire seconded the motion.

This board item is a request for the renewal of the Sage Intacct Accounting Software Service, a digital tool that supports various accounting tasks including general ledger management, bank reconciliation, budgeting, and accounts receivable. It also acts as a central repository for financial transactions. The proposed renewal for the fiscal year 2024-2025 is for an amount of \$48,643.20.

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

### **E. Approval of the Stampli Contract (Renewal)**

S. Houle made a motion to Bill Hall.

S. Fraire seconded the motion.

This board item involves a proposal to renew an agreement with Stampli, a cloud-based tool that employs AI and machine learning to streamline invoicing processes by automating processing, coding, and approvals, thus reducing manual work. The annual fee for using Stampli is projected to be approximately \$40,000.

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

### **F. Approval of Irvine Office Lease with the Irvine Company LLC (Renewal)**

M. Humphrey made a motion to Bill Hall.

L. Alvarado seconded the motion.

This board item discusses the upcoming expiration of a five-year lease on November 30, 2024, for the organization's current office space. Following negotiations with the real estate agent and the Irvine company, a three-year lease renewal has been agreed upon, instead of a five-year term, due to the changing dynamics in commercial real estate influenced by COVID-19. This shorter term will allow for reevaluation after three years.

The negotiation also secured a rent reduction for three months (December 1st to February 28th), resulting in a savings of approximately \$44,000, with an additional \$5,000 savings during the rent abatement period. The organization is satisfied with the outcomes of the negotiation and the functionality of the office space, with plans to reassess the situation after the three-year period.

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

## **IX. Education Services**

### **A. Approval of Curriculum Associates Agreement for i-Ready Assessment for 2024-25 (Renewal)**

S. Houle made a motion to Bill Hall.

M. Humphrey seconded the motion.

This board item pertains to the renewal of iReady, an internal assessment tool used for establishing local benchmarks in math and reading for students in grades K through 11.

The tool not only aids in assessing students but also offers professional development for staff. Diagnostic score reports generated by iReady are utilized throughout the academic year to inform curriculum decisions, shape intervention classes, and support various student needs. The total fiscal impact of renewing iReady is \$34,420.

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

**B. Approval of Bright Thinker Service Licenses (Renewal)**

S. Fraire made a motion to Bill Hall.

S. Houle seconded the motion.

This board item discusses the renewal of the Bright Thinker curriculum, an A-G and NCAA-approved asynchronous virtual online platform for students. The curriculum is actively updated with the latest offerings by attending various conferences to ensure students have access to the best resources. The fiscal impact of this renewal is \$81,500. The approach for licensing is initially conservative, with adjustments made as necessary based on demand.

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

**C. Approval of Bright Thinker Services Licenses True Up**

M. Humphrey made a motion to Bill Hall.

S. Fraire seconded the motion.

This board item addresses the need to purchase an additional 102 licenses for the Bright Thinker curriculum, supplementing the 300 licenses originally approved last year. This increase is necessary to meet the needs of the student body. The fiscal impact of adding these licenses is \$20,400.

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

**D. Approval of the Tutor.com (Renewal)**

S. Fraire made a motion to Bill Hall.

S. Houle seconded the motion.

This board item presents a proposal to continue using Tutor.com, a 24-hour on-demand tutoring service praised for its effectiveness in supporting both intervention and general education students. The service provides one-on-one tutoring sessions, which are recorded, allowing students to revisit the sessions as needed. The rigorous selection process ensures that the service is among the best available, offering both asynchronous and synchronous support. The total fiscal impact for maintaining this service is \$23,975.

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

**X. Personnel Services**

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



S. Houle made a motion to Bill Hall.

L. Alvarado seconded the motion.

This board item involves the submission of the annual declaration of need form for the 2024-2025 school year to the California Commission on Teacher Credentialing. This form is submitted each year to ensure compliance with regulations pertaining to staff credentialing. It is particularly important for addressing new or changing needs as they arise during the school year. The updates in this year's declaration include compliance with AB 1505 and are based on estimated needs for potential credentialing changes throughout the year. The form facilitates the school's ability to adapt and enhance staff qualifications as necessary, ensuring continued compliance and effectiveness in staffing. The board **VOTED** unanimously to approve the motion.

## **XI. Policy Development**

### **A. Approval of New Board Policies**

S. Houle made a motion to Bill Hall.

S. Fraire seconded the motion.

This new board policy at Excel Academy Charter School establishes procedures to ensure consistent banking activities in the event that the executive director or CEO is unavailable due to unforeseen circumstances. It designates the Director of Business Services as the primary authorized individual to handle banking activities during such events. The policy also emphasizes the importance of succession planning by setting up training and procedures for potential successors to the Director of Business Services. Compliance with relevant laws and regulations, as well as the organizational objectives of the school, is mandated. The policy will take effect upon approval by the board of directors.

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

## **XII. Comments**

### **A. Board Comments**

The board comments reflect strong appreciation and praise for the work and dedication of principals, teachers, and staff at the board meeting. Board members expressed gratitude for the insights provided by principals and the positive impact of their leadership on children. They also commended the quality of reports presented, congratulated Heidi on her positive evaluation, and acknowledged the continuous efforts and smooth presentations of the team. Additionally, they recognized the board members themselves, wishing a Happy Mother's Day to those who are parents. The comments highlighted the importance of hiring competent staff, which contributes to the organization's success and prevents future issues. Overall, the board conveyed deep appreciation for the educational and supportive activities provided to the students, emphasizing the relevance and significance of the school's teaching efforts.

### **B.**

### **CEO Comments**

Heidi expressed her gratitude to the board members for their support during her evaluation process, emphasizing her belief in continuous learning and the strength of her team. She highlighted recent efforts regarding the Helendale petition, praising the board's experience and contributions, particularly noting Bill's involvement. Heidi shared her excitement about the potential for a similar 7-year renewal in Warner, indicating the honor and recognition it represents for the team. She specifically acknowledged Lauren for her significant role in preparing the petition, a substantial effort involving a 100-page document. Heidi closed by thanking her entire team for their exceptional dedication and responsiveness under tight deadlines, expressing great honor in working with such a committed group.

### **XIII. 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 1:22 PM.

Respectfully Submitted,  
W. Hall

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#### **FOR MORE INFORMATION**

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

# Coversheet

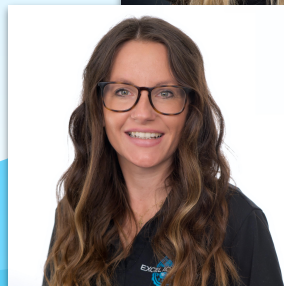
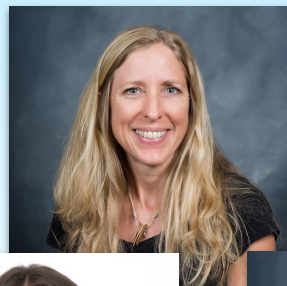
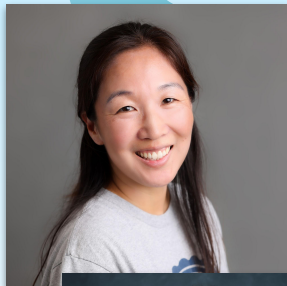
## Excel Academy Year in Review - Presented by Heidi Gasca, Executive Director

**Section:** VI. Correspondence/Proposals/Reports  
**Item:** A. Excel Academy Year in Review - Presented by Heidi Gasca, Executive Director  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:** Years of Service Staff.pdf



# *Celebrating 5 Years of Service*

2019-2024





# *Celebrating 10 Years of Service*

2014-2024



# Coversheet

## Consent - Business/Financial Services

**Section:** VII. Consent  
**Item:** A. Consent - Business/Financial Services  
**Purpose:**  
**Submitted by:**  
**Related Material:** 5.24.24 Semi Monthly Cash Requirement Rpt..pdf  
5.24.24 Monthly Cash Requirement Rpt..pdf  
5.10.24 Semi Monthly Cash Requirement Statement.pdf  
Check register 050124-053124.pdf  
2024-2025\_EACS Hatch and Cesario Legal Services Agreement.pdf  
2024 Bolton Insurance for Excel Academy.pdf

### BACKGROUND:

**Item:** Hatch & Cesario Agreement for Legal Services

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

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

Senior Partners \$375.00

Partners/Of-Counsel \$360.00

Senior Associate \$330.00

Associate \$315.00

Law Clerk: \$220.00

Senior Paralegal \$220.00

Paralegal: \$210.00

Education Consultant \$210.00

**Item:** Bolton Property and Casualty Insurance Renewal for 2024-25

**Background:** As the School's insurance broker, Bolton & Company completed the annual process to review and negotiate renewal rates for all insurance policies held by Corporation. The renewal rates take effect July 1, 2024.

It is recommended the Board approve the renewal rates for all property and casualty insurance policies for the 2024-2025 school year including: Property, General Liability, Automobile, Umbrella Liability,

Educators Legal Liability, Directors and Officers, Employment Practices Liability, Workers' Compensation, Student Accident, and Cyber Security.

Fiscal Impact: \$139,513.00



**Cash Requirements Statement**

**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: 8B0666753

Period Ending: 05/15/2024

Check Date: 05/24/2024

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 05/23/2024

*A wire request for \$41,266.04 will be sent to your bank on 05/22/2024*

**Items**

Checks / Vouchers	21
Additional Direct Deposit Accounts	2

**Billing**

Check Processing/Tax Service	628.95
Direct Deposit	7.50
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
<b>Total Billing</b>	<u>666.45</u>

**Tax Deposits**

	<u>Employee Deductions</u>	<u>Employer Liability</u>	<u>Total Deposit</u>
FICA/Social Security	1,571.36	1,571.36	3,142.72
Medicare	579.13	579.13	1,158.26
Federal W/H Tax	2,051.39		2,051.39
California W/H Next Day	1,003.73		1,003.73
California SDI Next Day	445.30		445.30
California ETT Qtrly		5.51	5.51
California SUTA		143.26	143.26
<b>Total Tax Deposits</b>	<u>5,650.91</u>	<u>2,299.26</u>	<u>7,950.17</u>

**Paycom Cash Requirements**

Net Direct Deposits - Paycom Pay	29,130.44
Direct Deposit Distribution - Paycom Pay	3,518.98
Taxes - PAYCOM Resp.	7,950.17
Payroll Fee	666.45
<b>Total Paycom Cash Requirements</b>	<u>41,266.04</u>

**Total Cash Requirements**

41,266.04



**Cash Requirements Statement**

**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: 2F353ED3F

Period Ending: 05/31/2024

Check Date: 05/24/2024

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 05/23/2024

*A wire request for \$718,767.91 will be sent to your bank on 05/22/2024*

**Items**

Checks / Vouchers	101
Additional Direct Deposit Accounts	11

**Billing**

Check Processing/Tax Service	1,707.26
Direct Deposit	9.75
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
<b>Total Billing</b>	<u>1,747.01</u>

**Tax Deposits**

	<u>Employee Deductions</u>	<u>Employer Liability</u>	<u>Total Deposit</u>
FICA/Social Security	4,591.97	4,591.97	9,183.94
Medicare	11,326.41	11,326.41	22,652.82
Federal W/H Tax	61,432.99		61,432.99
California W/H Next Day	29,874.03		29,874.03
California SDI Next Day	8,465.56		8,465.56
Hawaii W/H Semiweekly	845.59		845.59
Hawaii SUTA		55.01	55.01
<b>Total Tax Deposits</b>	<u>116,536.55</u>	<u>15,973.39</u>	<u>132,509.94</u>

**Paycom Cash Requirements**

Net Direct Deposits - Paycom Pay	557,596.03
Direct Deposit Distribution - Paycom Pay	26,914.93
Taxes - PAYCOM Resp.	132,509.94
Payroll Fee	1,747.01
<b>Total Paycom Cash Requirements</b>	<u>718,767.91</u>

**Total Cash Requirements**

718,767.91

**Cash Requirements Statement**

**EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: 228874E7E

Period Ending: 04/30/2024

Check Date: 05/10/2024

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 05/09/2024

*A wire request for \$39,155.89 will be sent to your bank on 05/08/2024*

**Items**

Checks / Vouchers	20
Additional Direct Deposit Accounts	2

**Billing**

Check Processing/Tax Service	615.48
Direct Deposit	7.50
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
Additional Services	400.00
<b>Total Billing</b>	<b>1,052.98</b>

**Tax Deposits**

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,417.58	1,417.58	2,835.16
Medicare	548.93	548.93	1,097.86
Federal W/H Tax	1,832.56		1,832.56
California W/H Next Day	944.03		944.03
California SDI Next Day	422.43		422.43
California ETT Qtrly		4.09	4.09
California SUTA		106.49	106.49
<b>Total Tax Deposits</b>	<b>5,165.53</b>	<b>2,077.09</b>	<b>7,242.62</b>

**Paycom Cash Requirements**

Net Direct Deposits - Paycom Pay	27,341.29
Direct Deposit Distribution - Paycom Pay	3,519.00
Taxes - PAYCOM Resp.	7,242.62
Payroll Fee	1,052.98
<b>Total Paycom Cash Requirements</b>	<b>39,155.89</b>

**Total Cash Requirements**

**39,155.89**

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

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 label	Method	Document no.	Amount	Amount applied	Cleared	Memo	Department	Location
CHASE 9313 - Chase Bank	Account no: 215769313												
	5/7/2024	4/30/2024	B-26856639	4115--1 Art-Megapixels School of Art	5880--Instructional Vendors &	EFT	20136004620	945.67	945.67	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/13/2024	4/16/2024	73691	2306--A Child's Dream	4310--Materials & Supplies	EFT	100859	40.45	40.45	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/28/2024	5/13/2024	B-268572289	5808--A Creative Learner	5880--Instructional Vendors &	EFT	20136004800	66.25	66.25	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/13/2024	4/30/2024	B-268566657	2022--A+ In Home Tutors, Inc. 2022--A+ In Home Tutors, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004668 20136004668	1,400.00 1,400.00	280.00 1,200.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	5/22/2024	5/2/2024	B-268567630	V3170--A+ Tutoring Inc. V3170--A+ Tutoring Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101040 101040	1,190.00 1,190.00	490.00 700.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
	5/22/2024	5/2/2024	B-268567690	1971--Abby Zabzy LLC DBA Home School Coach 1971--Abby Zabzy LLC DBA Home School Coach	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004750 20136004750	2,715.00 2,715.00	1,745.00 970.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	5/7/2024	4/30/2024	B-268566658	6174--Above & Beyond Athletics	5880--Instructional Vendors &	EFT	20136004635	350.00	350.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/22/2024	4/30/2024	B-268567005	5704--Achieve, Inc. 5704--Achieve, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101013 101013	687.76 687.76	220.00 467.76	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
	5/7/2024	4/30/2024	B-268565359	5704--Achieve, Inc.	5880--Instructional Vendors &	EFT	100818	159.00	159.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/28/2024	4/13/2024	471522A	2602--Acorn Naturalists	4310--Materials & Supplies	EFT	101117	132.32	132.32	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/13/2024	4/15/2024	471563A	2602--Acorn Naturalists	4310--Materials & Supplies	EFT	100866	210.76	105.29	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/15/2024	471562A	2602--Acorn Naturalists	4310--Materials & Supplies	EFT	100866	210.76	105.47	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/7/2024	4/8/2024	471383A	2602--Acorn Naturalists	4310--Materials & Supplies	EFT	100808	527.39	527.39	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/7/2024	4/8/2024	268500451	5553--Active Kids	4100--Textbooks & Core Curricu	EFT	20136004618	483.00	59.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/8/2024	268531698	5553--Active Kids	4100--Textbooks & Core Curricu	EFT	20136004618	483.00	180.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/8/2024	268473989	5553--Active Kids	4100--Textbooks & Core Curricu	EFT	20136004618	483.00	180.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/8/2024	268466353	5553--Active Kids	4100--Textbooks & Core Curricu	EFT	20136004618	483.00	32.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/8/2024	268522157	5553--Active Kids	4100--Textbooks & Core Curricu	EFT	20136004618	483.00	32.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/7/2024	4/23/2024	B-268566659	6185--Adage Dance Center LLC	5880--Instructional Vendors &	EFT	100810	602.00	602.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/28/2024	5/15/2024	B-268572295	6037--Aesthetic Climbing Gym, LLC	5880--Instructional Vendors &	EFT	101146	737.00	737.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/22/2024	5/6/2024	B-268569206	v3056--Al-Burooj Academy	5880--Instructional Vendors &	EFT	101058	1,004.38	1,004.38	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/13/2024	5/3/2024	1WV-04290-A	5776--Albium Transition Service 5776--Albium Transition Service	5800--Professional Services - 5800--Professional Services -	EFT EFT	100885 100885	825.00 825.00	313.50 511.50	In Transit In Transit		908--Intervention/Title I 908--Intervention/Title I	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	5/13/2024	4/26/2024	B-268566660	6086--Alicia Jones Coaching	5880--Instructional Vendors &	EFT	20136004649	360.00	360.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/22/2024	4/22/2024	920925	5016--All About Learning Press, Inc	4100--Textbooks & Core Curricu	EFT	101020	232.60	232.60	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/13/2024	5/1/2024	14441	5017--Alpha Vision, Inc. 5017--Alpha Vision, Inc.	5940--Technology Services 5940--Technology Services	EFT EFT	100868 100868	379.00 379.00	144.02 234.98	In Transit In Transit		912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
	5/22/2024	5/1/2024	B-268567633	3082--AlSajdah Academy	5880--Instructional Vendors &	EFT	20136004732	1,675.00	1,675.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/7/2024	4/22/2024	B-268563766	3082--AlSajdah Academy	5880--Instructional Vendors &	EFT	20136004641	1,675.00	1,675.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/28/2024	5/13/2024	B-268572297	2577--Amanda Leigh Holiday	5880--Instructional Vendors &	EFT	20136004789	839.75	839.75	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	5/28/2024	4/8/2024	1V6P-TGHX-W9GC	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	76.67	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/11/2024	1GJW-K4KX-940P	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	72.91	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/9/2024	1J6G-FWVV-XMGN	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	117.66	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/6/2024	1J61-W943-GCFF	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	7.52	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/9/2024	1T3C-DGVP-VK86	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	76.56	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/11/2024	1D7W-KRX3-F9X3	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	264.78	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/10/2024	16RC-7WR4-6TJW	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	38.98	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/10/2024	1KGC-KH1H-63C7	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	12.36	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/9/2024	1T3C-DGVP-VHXL	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	55.32	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/11/2024	1DWH-LNPD-GC7Y	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	9.15	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/15/2024	1TVO-TJYV-RHWF	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	95.74	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/9/2024	1DYF-KFGE-YYRO	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	359.56	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/10/2024	19Q3-HPOV-6VHM	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	9.15	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/6/2024	10C4-JTDH-F1G9	1925--Amazon Capital Services, Inc.	4100--Textbooks & Core Curricu	EFT	20136004804	20,866.19	26.27	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/15/2024	1TKY-4LRV-CDL3	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	71.48	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/2/2024	13M8-3D0A-3D7M	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	274.46	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/11/2024	1TKX-17XY-DMTJ	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	45.17	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/9/2024	1T1C-YTJ3-4464	1925--Amazon Capital Services, Inc.	4100--Textbooks & Core Curricu	EFT	20136004804	20,866.19	64.95	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/10/2024	1HP8-1G71-4XJH	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	82.49	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/10/2024	1Y9C-CVX7-77LG	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	20.14	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/11/2024	1HJ3-G4D6-DKFF	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	101.53	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/11/2024	199R-1V4H-DK6X	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	284.09	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/11/2024	16KG-CGXH-GMKX	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	194.71	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/15/2024	1XDA-7D9W-6YWT	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	37.70	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/15/2024	1PHG-P81G-9Y19	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	240.20	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/7/2024	1L1C-3DL4-N41C	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	366.35	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/6/2024	14T0-KCRC-G71M	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	35.01	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/10/2024	1N6G-WLIG-6WJZ	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	290.20	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/10/2024	1YV3-YM04-4MXL	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	101.79	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Warner
		4/10/2024	1T1M-T6W9-3F74	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	17.96	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/10/2024	1T1M-3DL4-WVX6	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	18.19	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/8/2024	164X-MFYX-TCK6	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	18.15	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/9/2024	1J6G-FWVV-YY1J	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	187.25	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/10/2024	1XDP-GPVM-6JRW	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	24.93	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/5/2024	1TWD-HCJX-44P4	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	50.12	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		4/9/2024	1YF9-C78R-73D4	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	41.51	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/9/2024	1TWD-HCJX-YCYL	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	131.90	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		4/10/2024	1XHW-LNWX-4R2J	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004804	20,866.19	46.94	In Transit			

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

4/2/2024	1H7V-TL1V-9CG1	1925-Amazon Capital Services, Inc.	4320-Office Supplies	EFT	20136004804	20,866.19	6.66	In Transit	915-Technology	2053-Excel Academy Charter School - Warner
4/10/2024	1VRW-XFNJ-6469	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	73.20	In Transit	907-Special Education	2073-Excel Academy Charter School - Helendale
4/10/2024	1HXF-TXFK-61J1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	57.99	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1TKY-NDLN-7YH1	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	63.20	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1TPR-96K6-4DKW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	199.80	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1HDW-NGWJ-39V9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	80.21	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1V4N-XR4E-420083	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	24.63	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1TFNN-PIV7-4D4W	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	97.86	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1V6P-TGHX-VNWW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	253.80	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1PRD-KW6P-4CTN	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	99.21	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1V4N-WXK6-3KFV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	444.73	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1HP4-1G71-3NKP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	27.14	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	1J3P-NRTJ-TRLR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	202.85	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1KK1-7KZY-3233	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	56.62	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	144D-6J9K-1K19	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	221.82	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1R2V-W706-6PDD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	9.15	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1PR3-3TQF-4FK4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	30.13	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1T1N-T6W9-69FO	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	55.52	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1F70-HA03-3YGR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	184.54	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1VUJ-W3HG-3RCD	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	13.13	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/15/2024	1POD-DLX4-71F4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	70.21	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	146L-9J43-VRDK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	134.07	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1TR7-PXKX-4XV3	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	95.08	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/11/2024	1N63-3AFN-PAZM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	78.52	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	1QCA-JJHD-147M	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	95.82	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1ND1-GPFO-W9XH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	16.37	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/6/2024	1MND-WHNG-DE3L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	10.86	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1T3J-YM04-3729	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	202.85	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/11/2024	14YV-9GL1-GV7D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	213.99	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1D7W-KRXX-3Q3K	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	39.86	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1M6L-6J9K-1K19	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	84.24	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	19D9-X7KT-96WT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	73.32	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	14T0-KCRC-KXG6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	30.14	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	19WT-TLMS-7D13	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	14.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	194Q-T31W-66TG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	162.08	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	12V9-499J-3KFX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	117.99	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1T1N-T6W9-6FDD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	9.15	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/11/2024	1KK1-7R7Y-9LXF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	97.20	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1HX9-XKX3-TL2L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	55.25	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/22/2024	16XL-NEON-11FD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	26.34	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1VWL-F7I3-434P	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	305.68	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	14YV-9GL1-GV7D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	640.93	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/12/2024	1WTJ-WGCM-KX11	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	101.42	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	14T0-KCRC-WR1Y	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	20.29	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	12V9-499J-3KFX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	31.60	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/16/2024	1L1V-71JM-H0J1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	20.87	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1PR3-3TQF-1O9K	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	205.38	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1JRM-43P-9D2L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	140.31	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1V4H-HHHW-6V16	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	86.39	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/3/2024	1TRD-FLYR-7CH3	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	161.95	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/8/2024	1CCA-TQF-V9V1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	144.52	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1HUS-G4D6-19W9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	19.19	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1TRP-V36T-1FOH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	158.98	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/12/2024	1KGS-HK1H-GDPX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	30.96	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/5/2024	14YV-9GL1-GV7D	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	16.15	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/16/2024	16Q3-86H4-CJMV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	88.34	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1M6L-6J9K-1K19	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	184.25	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1YKX-MF71-V9CT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	80.25	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/15/2024	1PW3-X093-7NRG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	1.66	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1RYX-1H4M-1X66	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	1.66	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1CP4-F73N-Y4QN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	379.60	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	1VGL-NGO7-7CNY	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	127.04	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	12V9-499J-3KFX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	99.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/11/2024	1ML4-MDXY-9FNW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	160.14	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/11/2024	1KGO-4WYJ-DXND	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	136.04	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1TKX-328K-V3KL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	59.84	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/5/2024	1TRX-QDMC-9LHF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	196.79	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/22/2024	1NMN-RYNG-3LDP	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	72.16	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1GCO-3MVA-3DJP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	286.57	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1T1V-YM04-3729	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	598.75	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/7/2024	1PNC-JGCF-RR4K	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	110.05	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1DX1-LTPR-WHKL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	27.45	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	173K-134K-6L33	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	21.52	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	1CP4-F73N-9729	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	129.75	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	14OD-DRGM-1TH6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	77.23	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1KDD-1PKR-6CM3	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	111.33	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	14YV-9GL1-6WRL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19				



Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

4/6/2024	1KJN-XHRR-G3FN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	14.52	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1CNH-3NPF-1D19	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	123.87	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/6/2024	143H-XCJ1-G13D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	8.49	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/15/2024	11Y7-M1F9-9MKK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	108.04	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/8/2024	1DX1-L1PR-1VL9	1925-Amazon Capital Services, Inc.	4310-Textbooks & Core Curricu	EFT	20136004804	20,866.19	36.23	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1MCK-M4CG-4RX9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	132.39	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	194D-T31W-1MRC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	97.85	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1JHS-TWRK-64XV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	54.20	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1MRV-RPX7-4L6V	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	58.17	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/11/2024	1D7K-RKX3-70J1	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	9.70	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1KQ3-HK1H-647C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	112.45	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/11/2024	13Y4-LYQ-0617	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	28.04	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1VRW-X1VU-6FRP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	256.19	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1Y1K-GLV-4V7M	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	45.74	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/11/2024	1HJ3-G4D6-F3GN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	16.61	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1PX1-34X7-44K7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	167.94	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1YC3-G2F1-48J1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	63.66	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1PRG-LF7-6W4Q	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	54.90	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	1VWV-J1H1-TCYC	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	6.93	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1VVJ-W3HQ-691L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	38.02	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1KJN-XHRR-YWKG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	57.61	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1QTM-X6WV-1YD3	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	93.15	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/11/2024	1VRW-X1VU-6W3M	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	29.29	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1311-C344-3HHW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	48.94	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/3/2024	1CQW-QFOW-4XVQ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	5.43	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/11/2024	1PRG-LF7-7VJ1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	342.63	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1PC4-FT3N-J4JZ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004804	20,866.19	118.80	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1YC3-G2F1-71FK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	92.81	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Warner
4/10/2024	1PRD-KW6P-19W7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	149.53	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/25/2024	1PRC-MX4Z-4LWC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004804	20,866.19	41.44	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
5/28/2024										
4/9/2024	1311-C344-1THL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	93.87	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1V4H-HHWH-ZNL6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	207.46	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1KJN-XHRR-2LWQ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004779	4,185.98	23.31	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1KJ1-3K1H-4V1H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	76.82	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1KQ3-HK1H-1GWW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	94.24	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/9/2024	1D7K-RKX3-70J1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	12.79	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	194D-T31W-69RC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	19.29	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Warner
4/7/2024	16K0-4GKD-LDDP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	225.52	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1HK1-ROV7-1FLG	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004779	4,185.98	49.59	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1HKM-LW9F-38P1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	193.12	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1YK3-19K1-48J1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	21.98	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1Y3K-134K-1MKH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	262.30	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	1PC4-FT3N-RD8F	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	9.67	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1JQ4-G674-Y7D1	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004779	4,185.98	26.93	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/4/2024	1VWV-J1H1-1DHY	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	176.23	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	1DX1-L1PR-178D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	21.63	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	198W-VRX3-7DLD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	158.58	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/3/2024	11XH-GNP3-74GR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	15.20	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/4/2024	1TDM-1D7D-14LJ	1925-Amazon Capital Services, Inc.	4320-Office Supplies	EFT	20136004779	4,185.98	228.60	In Transit	915-Technology	2073-Excel Academy Charter School - Warner
4/10/2024	1VRW-X1VU-6GL3	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	121.13	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1D7K-RKX3-70J1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	15.95	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1D7K-RKX3-70J1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	20.07	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1GMU-H17C-V1AW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	25.83	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/6/2024	1CDU-4XLE-GGKQ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	160.34	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1PRG-96D-38W7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	9.15	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/7/2024	1VWV-Y7G6-KJKK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	81.86	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1RTD-3MKF-Y667	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	14.64	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1YK3-19K1-48J1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	50.79	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1KQD-4WY7-6F4F	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	24.07	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1HK1-ROV7-3M9D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	61.97	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/10/2024	1CP4-FT3N-JK17	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	99.92	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1GQD-3MVA-6H1F	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	36.66	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	14WM-743J-W7PC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	37.28	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/4/2024	1YV1-HK76-K469	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004779	4,185.98	82.89	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/11/2024	1HR3-MQD3-9469	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	171.37	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1RTD-3MKF-Y667	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	103.38	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1VWV-J1H1-D1K1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	19.11	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/11/2024	1KQ3-HK1H-D1K1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	65.11	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/6/2024	1Y8W-MWJ1-F1HC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	238.72	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/8/2024	1GQD-3MVA-6H1D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	66.23	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/4/2024	1YV6-F4RG-HM33	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	31.90	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/9/2024	1DRP-YR33-33P6	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004779	4,185.98	141.79	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1PX7-3T0F-766X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	22.64	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/10/2024	1MCK-M4GG-3JFK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004779	4,185.98	96.09	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
5/22/2024										
3/31/2024	1HLK-39R7-OP6M	1925-Amazon Capital Services, Inc.	4320-Office Supplies	EFT	20136004683	22,282.25	45.71	In Transit	912-Administration/Office	2053-Excel Academy Charter School - Warner
4/3/2024	1T3K-MGL6-6X1P	1925-Amazon Capital Services, Inc.	4320-Office Supplies	EFT	20136004683	22,282.25	28.01	In Transit	912-Administration/Office	2053-Excel Academy Charter School - Warner
4/1										

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

4/1/2024	14N3-NKCV-3FRJ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	149.29	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	14N3-NKCV-3FRJ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	171.49	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/3/2024	11R9-W9NK-7G6P	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	804.48	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/26/2024	1361-F34H-F4T3	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	39.27	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/2/2024	13P9-7Q2M-9D2B	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	91.30	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/2/2024	11KC-V6XW-3Q7G	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	6.45	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/26/2024	11N6-3PRC-DGGG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	141.60	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/2/2024	13DQ-1NCT-71RM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	171.49	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/2/2024	13H9-WG6T-78R9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	39.86	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/2/2024	1KCN-C99W-4LHP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	19.55	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/2/2024	1KXV-NMVC-Y69R	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	28.36	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/2/2024	1KCN-C99W-379L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	110.25	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/2/2024	1H11-6DJF-1V9V	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	90.05	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1KMM-3K33-48WV	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	26.49	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1PHC-PR71-1KJ4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	7.52	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	13TV-NMKK-WHHH1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	27.49	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	1F6W-OTVL-76WK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	58.25	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1WLG-WNGF-61NM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	16.79	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	11DQ-WG7Y-4RMS	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	91.30	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/4/2024	1WJT-HGK3-HYRT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	62.05	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1RL1-PKGC-11X9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	66.72	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1T2D-WGKR-71FL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	485.88	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	16N1-73LX-3N1K	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	46.79	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	1DK4-PMPI-OTQL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	17.23	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/2/2024	16N1-73LX-77YR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	37.83	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/3/2024	17H1-RK6J-7YKD	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	14.32	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/2/2024	19W1-FJ7L-CJOM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	339.77	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	13P9-HFVQ-V68N	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	212.82	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	17XV-HJ12-54VK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	57.09	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	11RQ-WRKG-YNPT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	9.40	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1VHV-CTMR-PYTT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	10.90	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	19W1-41W4-4RGC	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	21.77	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1DTR-069D-16V9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	38.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	131H-H1KJ-1K6V	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	21.88	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1WVT-Y6GM-6CV1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	680.92	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1C4B-78VD-RCTF	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	20.98	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	11CT-14YF-7VGT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	21.84	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/3/2024	113K-MGLF-CMKW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	95.69	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	11RQ-WRKG-4QFK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	463.25	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/4/2024	1FPO-DKXX-1C7Y	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	91.16	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1GWR-CJ4J-7XCC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	44.31	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	16N1-73LX-0YXN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	21.18	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/3/2024	1VL1-1N6M-DK9N	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	121.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1WJQ-9GR6-6CTX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	16.49	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	19X1-41W4-4RGC	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	179.84	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/2/2024	11T6-MJ3T-CH9T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	16.27	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/4/2024	1JQ4-G674-19HP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	571.63	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1CRG-Y7YF-YL6H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	9.87	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1MV7-MDV9-JK3N	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	46.40	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1D77-V4LQ-W1FX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	15.17	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/25/2024	1LPR-W1H1-GU2T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	14.32	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	13P9-HFVQ-WCRP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	129.40	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/2/2024	19W1-FJ7L-7NCL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	15.06	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	11T6-MJ3T-3N1V	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	71.84	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	19X1-41W4-4RGC	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	191.84	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/3/2024	11RD-FLYR-D1KV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	115.36	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	197W-LCGT-QW1W	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	235.03	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	16N1-73LX-301H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	24.71	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	11WV-G6JF-6XG6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	30.44	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	131F-061D-9R6E	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	11.10	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	13CR-Y7YF-RYWV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	841.48	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/3/2024	1CPW-TRFP-DWYG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	234.19	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	19X1-41W4-4RGC	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	119.08	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1MGG-H6CD-V9WV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	117.97	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1YHF-CRNC-4TW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	32.31	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	11RQ-WRKG-4QFK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	46.79	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/25/2024	1XO4-Y96Q-3M7H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	60.86	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1YVM-974L-18J	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	15.71	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/3/2024	1KFC-79PC-DKXF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	112.75	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/4/2024	17H1-RK6J-HYFF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	75.88	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	131F-061D-QD1L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	158.63	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	194D-LTMS-Y9F0	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	9.15	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/2/2024	1H11-6DJF-1W0D	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	193.39	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	19R1-COK9-Q9WG	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	20136004683	22,282.25	66.64	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	194D-LTMS-RFNI	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	142.76	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1VX1-73HP-WNCC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25	49.01	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	11WK-KWGL-VLVC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	20136004683	22,282.25				



4/1/2024	1994-KYCD-769P	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	192.63	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1994-KYCD-769P	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	22,282.25	14.27	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/3/2024	1VCY-74DK-6PWK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	75.37	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1TYK-WY36-1VH6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	9.45	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/2/2024	13WV-3D3A-34DW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	91.28	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/3/2024	1K7M-H1JK-F4TY	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	306.66	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	14RP-MF4K-7CH4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	20.47	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1MCG-H6CD-VT6T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	101.88	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1T1F-PXND-4Z0M	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	14.27	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1GWR-CFJA-WLPL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	25.88	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/26/2024	1P3H-RTYO-FPPX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	9.78	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/1/2024	1PWC-XXWV-6C9G	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	271.99	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	1GGT-YPLD-461R	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	19.24	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/30/2024	1JLD-F9J9-MR9J	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	22,282.25	39.08	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
4/2/2024	1PTY-VTTC-9W8K	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	22,282.25	63.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
5/13/2024										
3/28/2024	16W3-LCLG-F1P6	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600463	19,130.82	7.70	In Transit	911-Executive Administration	2073-Excel Academy Charter School - Helendale
3/28/2024	194D-LTM3-D9DT	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600463	19,130.82	12.55	In Transit	911-Executive Administration	2053-Excel Academy Charter School - Warner
3/29/2024	1C4R-7RVD-G7KT	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600463	19,130.82	7.70	In Transit	911-Executive Administration	2073-Excel Academy Charter School - Helendale
3/29/2024	1C4R-7RVD-G7KT	1925-Amazon Capital Services, Inc.	4320-Office Supplies	EFT	2013600463	19,130.82	13.23	In Transit	912-Administration/Office	2073-Excel Academy Charter School - Helendale
3/30/2024	1WXY-HV1T-NHFJ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	58.10	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1MDX-WG7Y-9HGW	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	262.64	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1TKM-9WV1-VHWR	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	48.46	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1DLG-LVXR-FYJX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	140.72	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1DKA-RMP1-9DP7	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	8.48	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/27/2024	1RHO-WRKG-LQVF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	135.95	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	16WV-FR9Y-9HT4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	201.58	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1CYO-FRPP-4C9M	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	76.48	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/27/2024	1RHO-WRKG-LQVF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	430.91	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/30/2024	13WV-FH0Z-LR4L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	127.90	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1CYO-FRPP-VF7H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	292.39	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	1P3H-RTYO-FPPX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	12.58	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	13JP-QY7T-HOHN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	292.39	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1F16-LF99-F4MK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	216.05	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1P3H-RTYO-FPPX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	54.61	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1T06-DJCF-9339	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	24.99	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/17/2024	1DPW-DGPT-W4VL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	71.56	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	1MCG-H6CD-VT6T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	84.69	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	14T1-3M4Q-HQ6Y	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	72.92	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	1MDX-WG7Y-G1MH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	15.88	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1D7K-C6KX-81E7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	15.49	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	1XXW-KC6T-JH6H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	291.52	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/30/2024	13P9-HXDF-M7A0	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	159.28	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1MDX-WG7Y-CW6V	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	16.15	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/30/2024	1HWN-79LO-PRNX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	102.25	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1T9V-JVRV-7R47	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	14.00	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1F6W-QTVL-7X6L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	5.02	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	14TV-NMKK-G1M7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	204.05	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1P3H-RTYO-FPPX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	100.25	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/30/2024	13WV-FH0Z-M3TQ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	125.56	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	194D-LTM3-D9DT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	90.22	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	13P9-HXDF-9NCO	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	30.49	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/27/2024	1696-LLOJ-JM46	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	65.62	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1D7K-C6KX-VN1L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	82.87	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	1C4R-7RVD-78E7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	192.7	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/1/2024	19KG-XXWV-6M33	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	17.46	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	13WV-FH0Z-TW7R	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	33.67	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	1F16-LF99-F4MK	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	45.92	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/30/2024	1N3J-6V19-NNY7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	248.95	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	1P3H-RTYO-FPPX	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	103.40	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	1P3H-RTYO-FPPX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	124.58	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1T9V-JVRV-7G8K	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	102.80	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/30/2024	1N3J-6V19-LLGG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	76.99	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1MCG-H6CD-VHCC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	229.09	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1Y9V-6VMT-J3RN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	49.15	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/2/2024	14N3-MCWL-967L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	19.18	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1P3H-RTYO-FPPX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	82.63	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1MHP-DWRK-FDD3	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	175.40	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/5/2024	19LO-364Q-7XWV	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	23.37	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/30/2024	13P9-HXDF-9NCO	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	71.63	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1JLD-F9J9-D3KJ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	201.57	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
4/3/2024	1T38-6MTC-74G6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	13.04	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/30/2024	14TV-NMKK-M77L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	86.29	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1P3H-RTYO-FPPX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	86.29	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1MCG-H6CD-DVH7	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	8.80	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	13P9-HXDF-F4TW	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	80.29	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1N3J-6V19-HGDD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	477.40	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	131F-QRFO-7LWG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	130.29	In Transit	910-Instructional Funds	2053-Excel Academy

3/28/2024	JRC-CVJK-JNL	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	83.61	In Transit	710-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/23/2024	1PYC-17H1-16CK	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	120.52	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	NXK-LNMM-FLRX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	75.40	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/21/2024	147L-MOMG-G4EJ	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	63.33	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1DLC-LVKK-GTFL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	31.11	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/27/2024	13WV-FTHG-5MFF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	54.04	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1HWN-7PLQ-DWX1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	25.31	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/25/2024	1PHJ-P4T4-1FCF	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	439.50	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	146E-78VZ-LK0Z	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	68.42	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1F4W-OTVL-DTJM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	112.20	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1WXY-HV11-7VWG	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	52.42	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1DZF-F9J9-9YKJ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	132.73	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	1471-3M4Q-WK69	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	58.79	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1696-17X1-G1GT	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	62.55	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1K9P-9HYV-7JCF	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	90.04	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	1RRT-COK9-60P1	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	46.98	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1HWN-7PLQ-FX3P	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	92.96	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	13PZ-QTYT-H333	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	10.75	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	1471-3M4Q-GRLE	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	14.86	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1VTX-7THP-CF3H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	127.11	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	1JLD-F9J9-GCJ9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	213.20	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1WXY-HV11-K61P	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	76.03	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1MGG-H6CQ-FYRG	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	36.30	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	1D77-V4LG-W1UJ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	111.83	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1YRL-TT6K-9PWX	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	53.68	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1MDX-WG7Y-C43T	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	44.17	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1DZF-F9J9-9YKJ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	143.80	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/29/2024	1VTX-7THP-HDJD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	86.18	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1HWN-7PLQ-FX4F	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	68.36	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	197M-VLF7-6MFD	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	100.98	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	13PZ-QTYT-DHFM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	126.79	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1RHC-WKRC-DXWL	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	80.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	119V-JYVR-3MF4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	122.41	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/31/2024	1D77-C6CK-WD9C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	442.67	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1DZF-F9J9-9YKJ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	32.31	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	1696-17X1-6WDM	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	23.11	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1CFJ-F46F-7VJH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	65.36	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	11M-9WY1-43HJ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	32.19	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/30/2024	1696-17X1-N3TF	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	148.01	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1XTV-NMXX-9MX1	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	33.92	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1CRG-YTYY-FPM6	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	151.50	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/29/2024	11VW-1F3Q-GN06	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	190.77	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	11LK-39R7-K4M9	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	47.77	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	11MA-RNY7-HDKC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	30.85	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	11YM-7R7J-DF6F	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	5.38	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/31/2024	1XTV-NMXX-V0T1	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	104.41	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/30/2024	1KR3-L4D-NGWH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	56.75	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/27/2024	11VX-7THP-61DN	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	8.69	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	11CQ-FYRP-7C4H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	442.82	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	113D-1NCC-DG6L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	73.94	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	16R0-C0D7-9X9W	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	131.45	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1CFJ-F46F-7VJH	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	103.09	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/30/2024	1CJW-WKR7-PM1X	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	106.72	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/27/2024	1P9K-KT31-GT6G	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	34.28	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	11VX-7THP-61DN	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	81.92	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1DK4-PMPI-F9N4	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	13.92	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/30/2024	119V-JYVR-MF6N	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	75.76	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1JLD-F9J9-NUP	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	85.06	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	1T06-DJCF-1O4H	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	60.69	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1DK4-PMPI-F9N4	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600463	19,130.82	28.06	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/28/2024	1YYW-6VMT-DYVR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	20.62	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/28/2024	1VT7-MF9J-9Y7C	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600463	19,130.82	23.87	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
5/1/2024							125.68	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/23/2024	11HC-NYCT-YTQG	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600467	26,029.87	7.62	In Transit	911-Executive Administration	2073-Excel Academy Charter School - Helendale
3/24/2024	11QP-9K1M-4VDT	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600467	26,029.87	12.44	In Transit	911-Executive Administration	2053-Excel Academy Charter School - Warner
3/24/2024	1PXT-0XPR-4FPX	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600467	26,029.87	7.62	In Transit	903-Assessment	2053-Excel Academy Charter School - Helendale
3/24/2024	1D7N-LWT6-61KH	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600467	26,029.87	12.44	In Transit	907-Special Education	2053-Excel Academy Charter School - Warner
3/24/2024	16C4-RG9W-79TX	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600467	26,029.87	7.62	In Transit	906-Education Services	2073-Excel Academy Charter School - Helendale
3/24/2024	1UL1-GSPV-D3AW	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600467	26,029.87	12.44	In Transit	909-Business Services	2053-Excel Academy Charter School - Warner
3/23/2024	1RWU-WU61-XWD7	1925-Amazon Capital Services, Inc.	5863-Professional Development	EFT	2013600467	26,029.87	7.62	In Transit	912-Administration/Office	2073-Excel Academy Charter School - Helendale
3/23/2024	1RPV-D7CY-XMFO	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600467	26,029.87	12.09	In Transit	901-Human Resources	2053-Excel Academy Charter School - Warner
3/25/2024	1NRI-3F6P-1W1N	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600467	26,029.87	13.25	In Transit	908-Intervention/Title I	2053-Excel Academy Charter School - Warner
3/25/2024	19LM-WV1V-4YCR	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600467	26,029.87	8.39	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/22/2024	11CH-R14J-0XCC	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600467	26,029.87	24.55	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/27/2024	1T06-DJCF-7D19	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600467	26,029.87	75.32	In Transit	910-Instructional Funds	2073-Excel Academy Charter School - Helendale
3/26/2024	11HK-78Y1-DM8L	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600467	26,029.87	28.76	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/25/2024	1PRW-XLVJ-9NLJ	1925-Amazon Capital Services, Inc.	4310-Materials & Supplies	EFT	2013600467	26,029.87	22.85	In Transit	910-Instructional Funds	2053-Excel Academy Charter School - Warner
3/26/2024	1MC7-DHVI-C4TV	1925-Amazon Capital Services, Inc.	4100-Textbooks & Core Curricu	EFT	2013600467	26,029.87	10.22			







Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

3/21/2024	16CJ-R47L-H1M6	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	109.04	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/21/2024	1C4R-7R0D-3Y7G	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	18.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/21/2024	1K9M-X09X-76GG	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	24.48	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/22/2024	1CHP-R14J-Q0DY	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	81.69	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/21/2024	16C9-Q3LL-N6JF	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	33.80	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/24/2024	16N1-4Q3J-71KR	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	180.63	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/26/2024	1NR1-3F6P-6V91	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	144.89	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/26/2024	1HPA-9HD0-CMLX	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	109.21	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/21/2024	1NLS-4V7P-33P1	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	185.95	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/21/2024	131G-3KMM-JMP	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	41.93	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/22/2024	1Y3C-C14P-PLTV	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	10.66	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
3/26/2024	16C9-H47S-1K5Y	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	132.95	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/26/2024	11TK-XT31-4X9V	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	8.86	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
3/25/2024	11QP-9K1M-JCHG	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136004617	26,029.87	257.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/13/2024	B-26856662	2083--American Martial Arts Academy Fullerton	5880--Instructional Vendors &	EFT	100899	487.00	487.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/11/2024	B-26856663	5/1/2024	3330--American Tiger Martial Arts & Fitness	5880--Instructional Vendors &	EFT	20136004625	219.00	219.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/4/2024	4042407	5033--APLUS+ 5033--APLUS-	9330--Prepaid Expenses 9330--Prepaid Expenses	EFT EFT	100947 100947	14,750.00 14,750.00	5,605.00 9,145.00	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/11/2024	4/30/2024	B-26856682	6124--Applause Music Academy Glendora 6124--Applause Music Academy Glendora	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100830 100830	820.00 820.00	328.00 492.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-26856683	6125--Applause Music Academy Rancho Cucamonga	5880--Instructional Vendors &	EFT	100890	492.00	492.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	4/25/2024	MA75931354	1151--Apple Inc	4310--Materials & Supplies	EFT	101128	815.58	412.41	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
4/23/2024	MA75629198	1151--Apple Inc	4310--Materials & Supplies	EFT	101128	815.58	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	4/18/2024	MA74900092	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/18/2024	MA74896871	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
4/18/2024	MA74890839	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	408.16	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
4/18/2024	MA74891044	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
4/18/2024	MA74896870	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
4/18/2024	MA74890838	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	333.65	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
4/18/2024	MA74900093	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
4/18/2024	MA74890837	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
4/18/2024	MA74900091	1151--Apple Inc	4310--Materials & Supplies	EFT	100965	3,578.00	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	4/18/2024	MA74890840	1151--Apple Inc	4310--Materials & Supplies	EFT	100863	1,225.98	408.16	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
4/18/2024	MA74890841	1151--Apple Inc	4310--Materials & Supplies	EFT	100863	1,225.98	405.17	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
4/18/2024	MA74890836	1151--Apple Inc	4310--Materials & Supplies	EFT	100863	1,225.98	412.65	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/13/2024	4/30/2024	B-26856684	5864--Aquatic Explorations and Safety Training	5880--Instructional Vendors &	EFT	100849	430.00	430.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-26856686	1370--Arbor Learning Community 1370--Arbor Learning Community	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004659 20136004659	1,745.00 1,745.00	785.00 960.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/15/2024	B-268572887	3126--Archery Champs	5880--Instructional Vendors &	EFT	20136004796	603.43	603.43	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572298	1881--Ardent Academy for Gifted Youth	5880--Instructional Vendors &	EFT	20136004812	1,716.67	1,716.67	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/29/2024	B-26856687	5641--Ark Academy 5641--Ark Academy	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100879 100879	2,000.00 2,000.00	1,435.00 565.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572299	1994--Art 4 Kids and Teens 1994--Art 4 Kids and Teens	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101099 101099	596.00 596.00	149.00 447.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/11/2024	4/30/2024	B-26856688	1622--Art Experience Studio 1622--Art Experience Studio	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004639 20136004639	430.00 430.00	250.00 180.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572300	6254--Art of Jiu Jitsu Costa Mesa	5880--Instructional Vendors &	EFT	20136004792	420.00	420.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-26856689	6254--Art of Jiu Jitsu Costa Mesa 6254--Art of Jiu Jitsu Costa Mesa	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004656 20136004656	5,466.00 5,466.00	5,216.00 250.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/11/2024	4/9/2024	1NV2308683	1321--Art of Problem Solving	4100--Textbooks & Core Curricu	EFT	20136004632	167.92	167.92	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/11/2024	5/1/2024	B-26856690	1849--Art Steps, Inc Yorba Linda	5880--Instructional Vendors &	EFT	100813	422.00	422.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567638	3052--Art Steps, Inc. 3052--Art Steps, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101019 101019	1,950.25 1,950.25	90.00 1,860.25	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567636	3015--Art Steps, Inc. Costa Mesa	5880--Instructional Vendors &	EFT	100946	283.50	283.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/11/2024	4/25/2024	B-268566693	6150--Art Studio Pillar 6150--Art Studio Pillar	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004638 20136004638	488.00 488.00	288.00 200.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/9/2024	B-268570034	1061--Art With Aunt Jes	5880--Instructional Vendors &	EFT	20136004692	126.00	126.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/14/2024	B-268572301	2180--ARTIme, LLC.	5880--Instructional Vendors &	EFT	101107	2,170.00	2,170.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567640	v3054--Ascend Institute for Youth Skills Developm v3054--Ascend Institute for Youth Skills Developm	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004708 20136004708	6,331.00 6,331.00	1,655.00 4,676.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567589	2101--Automotive Technology Group, Inc. dba U 2101--Automotive Technology Group, Inc. dba U	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004713 20136004713	1,400.00 1,400.00	400.00 1,000.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567643	1441--AVPA at La Sierra University	5880--Instructional Vendors &	EFT	20136004739	390.00	390.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/3/2024	B-268569207	v3089--B & B Music School	5880--Instructional Vendors &	EFT	101009	130.00	130.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/15/2024	D797	2390--Barnabas Robotics, Inc.	4310--Materials & Supplies	EFT	20136004645	52.04	52.04	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268567645	6313--Barnyard Buddies LLC	5880--Instructional Vendors &	EFT	101048	550.00	550.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572302	4153--Beach Tutors	5880--Instructional Vendors &	EFT	101074	244.00	244.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566694	4153--Beach Tutors	5880--Instructional Vendors &	EFT	100908	1,920.00	1,920.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572303	1694--Beaumont Music Centre	5880--Instructional Vendors &	EFT	101108	672.00	672.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/11/2024	4/9/2024	23226	2445--Beautiful Feet Books, Inc.	4310--Materials & Supplies	EFT	100797	31.40	31.40	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/20/2024	2024-0218	5662--Beehvelvy 5662--Beehvelvy	9330--Prepaid Expenses 9330--Prepaid Expenses	EFT EFT	101082 101082	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



Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

5/7/2024	5/1/2024	B-26856695	v3063--Belami A. Dufrene	5880--Instructional Vendors &	EFT	100804	410.00	410.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/10/2024	B-268572304	5996--Belmont Music Studio Music Lessons	5880--Instructional Vendors &	EFT	101126	225.00	225.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567649	5996--Belmont Music Studio Music Lessons	5880--Instructional Vendors &	EFT	101022	225.00	225.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/29/2024	B-268566696	5996--Belmont Music Studio Music Lessons	5880--Instructional Vendors &	EFT	100936	535.00	535.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/12/2024	B-268572305	6016--Bethany Cowan Art	5880--Instructional Vendors &	EFT	101127	150.00	150.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/16/2024	BLJ-1543	5510--Big Life Journal	4100--Textbooks & Core Curricu	EFT	20136004665	158.90	158.90	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	4/24/2024	2842	3036--BioBox Labs LLC	4100--Textbooks & Core Curricu	EFT	101102	246.96	246.96	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	12/18/2023	2619	3036--BioBox Labs LLC	4100--Textbooks & Core Curricu	EFT	100881	563.64	563.64	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/26/2024	B-268566700	2149--Blonersds	5880--Instructional Vendors &	EFT	20136004680	132.00	132.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/20/2024	B-268572888	v3149--Blackbelt Collective Krav Maga LLC	5880--Instructional Vendors &	EFT	101144	209.00	209.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/12/2024	17945	1278--Blackbird and Company	4100--Textbooks & Core Curricu	EFT	101014	678.79	678.79	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/16/2024	2189037	6381--Blankrome 6381--Blankrome	5810--Legal 5810--Legal	EFT EFT	100930 100930	1,251.63 1,251.63	475.62 776.01	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566701	6162--Blooming Anomaly	5880--Instructional Vendors &	EFT	100909	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/5/2024	B-268569208	6049--Blossom Hill Ranch LLC	5880--Instructional Vendors &	EFT	101063	885.00	885.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/30/2024	B-268566702	3329--Blue Buoy Swim School	5880--Instructional Vendors &	EFT	20136004628	1,000.00	1,000.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	5/1/2024	B-268566703	6312--Boaz Rhythm Center Inc	5880--Instructional Vendors &	EFT	20136004631	450.00	450.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567652	2806--Brain Builders STEM Education 2806--Brain Builders STEM Education	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100969 100969	875.00 875.00	91.00 784.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567655	v3002--Breakthrough Sports LLC v3002--Breakthrough Sports LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101066 101066	1,447.27 1,447.27	147.50 1,299.77	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566731	6118--Bridges Equestrian, Inc.	5880--Instructional Vendors &	EFT	100922	1,200.00	1,200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572306	5962--Bright Star Learners Academy, LLC	5880--Instructional Vendors &	EFT	101137	600.00	600.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	4/29/2024	SNV9383	3210--Bright Thinker	4100--Textbooks & Core Curricu	EFT	101141	119.08	119.08	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	3/29/2024	SNV9166	3210--Bright Thinker 3210--Bright Thinker	4101--Textbooks & Core Curricu 4101--Textbooks & Core Curricu	EFT EFT	101031 101031	20,400.00 20,400.00	7,752.00 12,648.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/16/2024	4/16/2024	2089-052024	5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE 5796--BRMS - CharterLIFE	3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments	EFT EFT EFT EFT EFT EFT	20136004681 20136004681 20136004681 20136004681 20136004681 20136004681	111,736.75 111,736.75 6,426.97 111,736.75 111,736.75 111,736.75	36,031.10 10,486.44 3.32 58,786.88 2.04	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 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/16/2024	4/16/2024	Admin-2089-052024	5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA 5795--BRMS - FSA	3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments 3990--PY Benefit Adjustments	EFT EFT EFT EFT	20136004682 20136004682 20136004682 20136004682	119.00 119.00 119.00 119.00	20.15 32.87 53.63 12.35	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
5/13/2024	4/26/2024	B-268566736	5829--Broadway Gymnastics School	5880--Instructional Vendors &	EFT	20136004652	236.00	236.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268569209	2199--Burbank Music Academy	5880--Instructional Vendors &	EFT	100955	450.00	450.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566738	1126--Buzzy Mae Music Academy	5880--Instructional Vendors &	EFT	20136004661	2,037.50	2,037.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572307	1355--C3 Classes, LLC	5880--Instructional Vendors &	EFT	101091	228.34	228.34	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569211	1355--C3 Classes, LLC	5880--Instructional Vendors &	EFT	101036	330.00	330.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566739	1355--C3 Classes, LLC	5880--Instructional Vendors &	EFT	100893	2,409.84	2,409.84	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566741	5648--CA Training Facility 5648--CA Training Facility	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004678 20136004678	1,210.00 1,210.00	250.00 960.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566746	v3140--Cadenza Music Academy	5880--Instructional Vendors &	EFT	100924	382.50	382.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567657	5684--Calique Jiu Jitsu Walnut Academy	5880--Instructional Vendors &	EFT	101003	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	5/1/2024	B-268566748	1424--California Gymnastics, LLC	5880--Instructional Vendors &	EFT	100857	260.00	260.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/27/2024	B-268566751	2609--Candi Chavez	5880--Instructional Vendors &	EFT	100934	360.00	360.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	4/26/2024	52556929R1	2345--Carolina Biological Supply Company	4310--Materials & Supplies	EFT	101109	169.80	169.80	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	4/17/2024 4/18/2024	52545264R1 52546477R1	2345--Carolina Biological Supply Company 2345--Carolina Biological Supply Company	4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT	101030 101030	780.53 780.53	701.76 78.77	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
5/13/2024	4/1/2024	223756	5950--CASBO 5950--CASBO	9330--Prepaid Expenses 9330--Prepaid Expenses	EFT EFT	100903 100903	1,750.00 1,750.00	665.00 1,085.00	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567661	6165--Catherine Croisette Cello	5880--Instructional Vendors &	EFT	101015	150.00	150.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/3/2024	B-268569212	6023--Celebration Education	5880--Instructional Vendors &	EFT	100954	1,120.00	1,120.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569213	1784--Celeste Hueter	5880--Instructional Vendors &	EFT	20136004698	678.34	678.34	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/2/2024	2172	6309--Champions Services Incorporated	5100--SpEd Consultants and Ven	EFT	100940	1,406.25	1,406.25	In Transit	907--Special Education	2053--Excel Academy Charter School - Warner
5/13/2024	4/25/2024	B-268566840	6286--Chapman Hamburg Art Classes	5880--Instructional Vendors &	EFT	100929	330.00	330.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

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5/13/2024	5/1/2024	1775	5809--Charter Connect 5809--Charter Connect	5841--Community Marketing 5841--Community Marketing	EFT EFT	100844 100844	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
5/28/2024	5/13/2024	B-268572310	2246--Chef Tech Cooking School	5880--Instructional Vendors &	EFT	20136004775	455.00	455.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/29/2024	B-268566757	2246--Chef Tech Cooking School	5880--Instructional Vendors &	EFT	20136004646	1,300.00	1,300.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/10/2024	B-268570434	1967--Cheryl Thomas	5880--Instructional Vendors &	EFT	101100	460.00	460.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567663	1967--Cheryl Thomas	5880--Instructional Vendors &	EFT	101007	460.00	460.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572311	6336--Chess Wizards Inc. 6336--Chess Wizards Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101103 101103	252.00 252.00	36.00 216.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/13/2024	4/22/2024	B-268566758	6336--Chess Wizards Inc. 6336--Chess Wizards Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100913 100913	630.00 630.00	306.00 324.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/7/2024	4/22/2024	B-268563767	6336--Chess Wizards Inc. 6336--Chess Wizards Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100825 100825	1,584.00 1,584.00	720.00 864.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572308	2391--Christian Classical Conservatory LLC	5880--Instructional Vendors &	EFT	20136004788	55.56	55.56	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566753	2391--Christian Classical Conservatory LLC	5880--Instructional Vendors &	EFT	20136004676	400.00	400.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567705	3401--Christina Choate	5880--Instructional Vendors &	EFT	20136004718	920.00	920.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572313	6122--Christina O'Herin	5880--Instructional Vendors &	EFT	20136004797	300.00	300.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268567664	2749--Circle City School Enrichment Program	5880--Instructional Vendors &	EFT	101025	4,475.00	4,475.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567665	1110--Claremont Chefs Academy	5880--Instructional Vendors &	EFT	101033	140.00	140.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/25/2024	B-268566765	2017--Claremont Community School of Music 2017--Claremont Community School of Music	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004654 20136004654	587.50 587.50	211.50 376.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/7/2024	4/29/2024	B-268565358	1263--Classical Learning Resource Center	5880--Instructional Vendors &	EFT	100822	250.00	250.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	3/22/2024	11234756	2773--Classroom Complete Press	4100--Textbooks & Core Curricu	EFT	101053	44.95	44.95	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/2/2024	L241191378	5108--CliftonLarsonAllen LLP 5108--CliftonLarsonAllen LLP	5820--Audit & CPA 5820--Audit & CPA	EFT EFT	100883 100883	9,485.70 9,485.70	5,881.13 3,604.57	In Transit In Transit	909--Business Services 909--Business Services	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/7/2024	4/10/2024	INV5430	1163--CM School Supply, Inc.	4310--Materials & Supplies	EFT	100803	119.94	119.94	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567667	5970--Code Ninjas Irvine	5880--Instructional Vendors &	EFT	100957	498.00	498.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/8/2024	B-268569339	v3152--Code Ninjas Santa Clarita	5880--Instructional Vendors &	EFT	100988	200.00	200.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/14/2024	1004	2279--Cogito International, Inc	5880--Instructional Vendors &	EFT	20136004801	520.00	520.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/16/2024	B-268572889	1533--Common Thread Claremont	5880--Instructional Vendors &	EFT	20136004794	780.00	780.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572314	2531--Contigo Language Learning	5880--Instructional Vendors &	EFT	101122	320.00	320.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566766	2964--Corona Inline 2964--Corona Inline	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004657 20136004657	500.51 500.51	72.87 427.64	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567671	5520--Creative Academy Tutoring Center 5520--Creative Academy Tutoring Center	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004685 20136004685	710.00 710.00	280.00 430.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572315	5927--Creative Brain Learning	5880--Instructional Vendors &	EFT	101094	358.34	358.34	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569214	3240--Creative Creatures & Co.	5880--Instructional Vendors &	EFT	20136004760	1,357.94	1,357.94	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566770	1403--Creative Learning Place Inc	5880--Instructional Vendors &	EFT	20136004666	400.00	400.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567710	v3076--Cristina E. O'Connell v3076--Cristina E. O'Connell	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004748 20136004748	1,505.00 1,505.00	185.00 1,320.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566771	3172--Dancing Keys Music Studio LLC	5880--Instructional Vendors &	EFT	100888	552.50	552.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/5/2024	B-268569229	3081--Daniel Alarco, Jr.	5880--Instructional Vendors &	EFT	20136004710	600.00	600.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572316	6341--Danielle Stucken	5880--Instructional Vendors &	EFT	101081	780.00	780.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572320	4165--Denise A. Klein	5880--Instructional Vendors &	EFT	101080	140.00	140.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/4/2024	B-268569216	5654--Denise Williams	5880--Instructional Vendors &	EFT	20136004721	250.00	250.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/7/2024	4/22/2024	B-268566772	5654--Denise Williams 5654--Denise Williams	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004636 20136004636	2,905.00 2,905.00	740.00 2,165.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566952	6093--Dennis Frayne Music Studio	5880--Instructional Vendors &	EFT	100928	690.40	690.40	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567672	2623--Dexter Creative	5880--Instructional Vendors &	EFT	100961	274.00	274.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/9/2024	P42797250101	1171--Discourt School Supply	4310--Materials & Supplies	EFT	100820	278.89	278.89	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/26/2024	B-268566792	6147--DK Tutoring	5880--Instructional Vendors &	EFT	100841	290.00	290.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566795	1383--Drawn2Art Chino Hills	5880--Instructional Vendors &	EFT	100910	800.00	800.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566798	2192--Drawn2Art Northridge	5880--Instructional Vendors &	EFT	100865	1,280.00	1,280.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	5/1/2024	B-268566808	6135--Drawn2Art Sherman Oaks	5880--Instructional Vendors &	EFT	100907	108.00	108.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	5/2/2024	B-268567674	5878--Drawn2Art Valencia	5880--Instructional Vendors &	EFT	100873	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	4/17/2024	INVISI954	1350--DriversEd.Com	4100--Textbooks & Core Curricu	EFT	101008	24.95	24.95	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/8/2024	B-268570036	2269--Dunamix Dance Project, Inc	5880--Instructional Vendors &	EFT	20136004687	575.00	575.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

5/13/2024	4/15/2024	2868	v3105--eat2Explore, Inc.	4100--Textbooks & Core Curricu	EFT	100845	69.90	69.90	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/11/2024	B-268572318	3250--Edward V. West	5880--Instructional Vendors &	EFT	20136004805	57.00	57.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	3/31/2024	12315	5162--Effectual Educational Consulting Services - 5162--Effectual Educational Consulting Services - 5162--Effectual Educational Consulting Services - 5162--Effectual Educational Consulting Services -	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT EFT EFT	100814 100814 100814 100814	1,700.00 1,700.00 1,700.00 1,700.00	165.00 230.00 550.00 755.00	In Transit In Transit In Transit In Transit	ices March 2024 ices March 2024 ices March 2024 ices March 2024	907--Special Education 907--Special Education 907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569217	5699--Elite Dance Academy of Orange County	5880--Instructional Vendors &	EFT	100962	75.00	75.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/26/2024 5/1/2024	B-268564813 B-268566698	4103--Elizabeth K Gillis 4103--Elizabeth K Gillis	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100807 100807	759.00 759.00	477.00 382.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572319	6167--Elizabeth Welsh	5880--Instructional Vendors &	EFT	101148	206.25	206.25	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/5/2024 5/5/2024 4/26/2024	284-260359-4 2842903584 B-268566815	1376--EMH Sports USA, Inc. 1376--EMH Sports USA, Inc. 1376--EMH Sports USA, Inc. 1376--EMH Sports USA, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven 5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT EFT EFT	100853 100853 100853 100853	3,017.00 3,017.00 3,017.00 3,017.00	380.00 1,425.00 927.00 285.00	In Transit In Transit In Transit In Transit	ices April 2024 ices April 2024	907--Special Education 907--Special Education 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
5/7/2024	4/4/2024 4/4/2024	284-259853-3 2842598523	1376--EMH Sports USA, Inc. 1376--EMH Sports USA, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100816 100816	2,090.00 2,090.00	380.00 1,710.00	In Transit In Transit	Speech Services APE Services	907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024 5/8/2024	B-268567675 B-268569340	5813--Encourage Learning 5813--Encourage Learning	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004702 20136004702	357.50 357.50	297.50 60.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
5/13/2024	5/1/2024	B-268566817	5813--Encourage Learning 5813--Encourage Learning	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004648 20136004648	520.00 520.00	120.00 400.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566819	5976--Epic Surf Skills	5880--Instructional Vendors &	EFT	100874	260.00	260.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/29/2024	B-268566821	5845--Eriko Tsuji	5880--Instructional Vendors &	EFT	20136004677	220.00	220.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/9/2024	455010	3031--Essentials in Writing	4100--Textbooks & Core Curricu	EFT	100898	89.00	89.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/7/2024	4/9/2024	199156	3031--Essentials in Writing	4100--Textbooks & Core Curricu	EFT	100809	171.05	171.05	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/7/2024	B-268569218	1615--Esther Brill	5880--Instructional Vendors &	EFT	100956	110.00	110.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567676	2956--Evolution Swim Academy Mission Viejo, LL	5880--Instructional Vendors &	EFT	20136004759	978.00	978.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567677	5579--Evolution Swim Academy Rancho Mission	5880--Instructional Vendors &	EFT	20136004746	318.94	318.94	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/25/2024	B-268566822	5591--Faith Seymour Tutoring Services	5880--Instructional Vendors &	EFT	100842	200.00	200.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268567678	1789--Fashion Camp - Create. Design. Sew. LLC 1789--Fashion Camp - Create. Design. Sew. LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004695 20136004695	1,530.04 1,530.04	196.41 1,333.63	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572321	5822--Feltton Ninja Academy 5822--Feltton Ninja Academy	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101124 101124	3,479.00 3,479.00	2,689.00 790.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/5/2024	B-268569219	v3022--Fired Up Arts	5880--Instructional Vendors &	EFT	100986	158.00	158.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567683	5561--Firestorm Freerunning - Galaxy LLC	5880--Instructional Vendors &	EFT	20136004704	2,085.00	2,085.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567682	1854--Firestorm Freerunning Ultra LLC	5880--Instructional Vendors &	EFT	101069	731.50	731.50	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	8/16/2023	woo-2797460	5882--First Knowledge, Inc.	4100--Textbooks & Core Curricu	EFT	101072	199.00	199.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/17/2024	B-268572891	6257--First Touch Soccer	5880--Instructional Vendors &	EFT	101112	130.00	130.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/5/2024	B-268569220	6042--Fit 2 Be Free LLC	5880--Instructional Vendors &	EFT	101016	300.00	300.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566824	5689--Floaties Swim School, LLC	5880--Instructional Vendors &	EFT	100894	340.00	340.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566826	5936--Flow Academy Jiu Jitsu 5936--Flow Academy Jiu Jitsu	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004651 20136004651	1,465.00 1,465.00	290.00 1,175.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566828	2572--Focus Dance Center	5880--Instructional Vendors &	EFT	100856	210.00	210.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566769	2361--Foothill Creative Arts Group	5880--Instructional Vendors &	EFT	100880	336.00	336.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/15/2024	B-268572322	4174--FortePiano Music School	5880--Instructional Vendors &	EFT	20136004780	240.00	240.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/6/2024	B-268569221	4174--FortePiano Music School	5880--Instructional Vendors &	EFT	20136004697	195.00	195.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/2/2024	B-268567684	6355--Freedom in Motion Gym Murrieta	5880--Instructional Vendors &	EFT	101113	529.00	529.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567686	6108--Freedom in Motion, Riverside	5880--Instructional Vendors &	EFT	20136004699	382.00	382.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572323	6142--Fullerton Family YMCA 6142--Fullerton Family YMCA	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101092 101092	1,468.34 1,468.34	347.34 1,121.00	In Transit In Transit		910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572324	6374--G Academy	5880--Instructional Vendors &	EFT	20136004790	125.00	125.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567687	4110--Gabrina Casillas Owen	5880--Instructional Vendors &	EFT	100983	420.00	420.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567688	1883--Georgianne Gould	5880--Instructional Vendors &	EFT	20136004724	140.00	140.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566830	1866--Giordano's ATA Martial Arts	5880--Instructional Vendors &	EFT	100931	149.00	149.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569222	6256--Glendora Music and Arts School	5880--Instructional Vendors &	EFT	20136004720	635.00	635.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/6/2024	B-268569225	6239--Golden Star Educational Services	5880--Instructional Vendors &	EFT	100968	1,450.00	1,450.00	In Transit		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	5/1/2024	B-268566833	5924--Goldfish Swim School of Aliso Viejo	5880--Instructional Vendors &	EFT	20136004672	463.00	463.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/11/2024	B-268572368	2171--Grace E. Hickok	5880--Instructional Vendors &	EFT	20136004799	200.00	200.00	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567525	2171--Grace E. Hickok	5880--Instructional Vendors &	EFT	20136004772	1,357.50	1,357.50	In Transit		910--Instructional Funds	2053--Excel Academy Charter School - Warner

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5/22/2024	5/3/2024	B-268569226	2174--Gracie Barra Corona	5880--Instructional Vendors &	EFT	100944	1,184.00	1,184.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/29/2024	B-268566836	5999--Gracie Barra RSM	5880--Instructional Vendors &	EFT	100916	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/16/2024	B-268572892	5496--Gracie Barra Upland	5880--Instructional Vendors &	EFT	101115	4,240.00	4,240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	5/1/2024	645900784	6015--Granite Telecommunications 6015--Granite Telecommunications	5910--Telephone 5910--Telephone	EFT EFT	100860 100860	1,686.95 1,686.95	1,045.91 641.04	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/6/2024	B-268569228	2177--Greenwave Surf	5880--Instructional Vendors &	EFT	20136004752	465.00	465.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	3/31/2024	2403	6310--Growing Healthy Children Therapy Services 6310--Growing Healthy Children Therapy Services	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100805 100805	416.50 416.50	297.50 119.00	In Transit In Transit	OT Services 907--Special Education	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567689	1399--Gryphon Fitness Studio 1399--Gryphon Fitness Studio	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004741 20136004741	522.50 522.50	70.00 452.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/27/2024	B-268566837	2383--Guitar Ninjas 2383--Guitar Ninjas	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100895 100895	1,335.00 1,335.00	735.00 600.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/10/2024 4/10/2024	INV000266794 INV000267026	2541--Hand2Mind 2541--Hand2Mind	4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT	100878 100878	148.94 148.94	43.49 105.45	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
5/7/2024	4/26/2024 4/25/2024	B-268564818 B-268563769	2007--Hangar 18 East Riverside, Inc. 2007--Hangar 18 East Riverside, Inc. 2007--Hangar 18 East Riverside, Inc.	5880--Instructional Vendors & 5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT EFT	20136004634 20136004634 20136004634	308.00 308.00 308.00	44.00 88.00 176.00	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 2053--Excel Academy Charter School - Warner
5/7/2024	4/26/2024	B-268564820	5489--Hangar 18 Mission Viejo	5880--Instructional Vendors &	EFT	20136004626	238.00	238.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/22/2024	B-268563770	1652--Hangar 18 Upland, Inc	5880--Instructional Vendors &	EFT	20136004629	288.00	288.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/18/2024	B-268572893	5984--Healthy Footprints Adventure Community	5880--Instructional Vendors &	EFT	20136004787	450.00	450.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/7/2024	B-268569341	5984--Healthy Footprints Adventure Community 5984--Healthy Footprints Adventure Community	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004742 20136004742	405.00 405.00	147.00 258.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566842	v3137--Hector Y. Martinez	5880--Instructional Vendors &	EFT	100869	210.00	210.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/6/2024	33408	6379--Heritage Museum of Orange County 6379--Heritage Museum of Orange County	5835--Field Trips 5835--Field Trips	EFT EFT	100891 100891	640.00 640.00	340.00 300.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/25/2024	B-268566845	6322--High Desert Math Tutor	5880--Instructional Vendors &	EFT	100905	632.00	632.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/15/2024	B-268572895	4113--History Dragon	5880--Instructional Vendors &	EFT	101147	550.00	550.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/17/2024	B-268572896	1005--Holly Dodson	5880--Instructional Vendors &	EFT	101110	905.00	905.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/19/2024	582223	1179--Home Science Tools	4310--Materials & Supplies	EFT	101001	142.57	142.57	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/15/2024	581026	1179--Home Science Tools	4310--Materials & Supplies	EFT	100870	84.59	84.59	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	4/26/2024	B-268567518	1415--Hong Liang	5880--Instructional Vendors &	EFT	20136004764	240.00	240.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567691	5686--Huntington Learning Center	5880--Instructional Vendors &	EFT	20136004727	732.00	732.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567692	5711--Icetown Riverside 5711--Icetown Riverside	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101043 101043	617.01 617.01	51.01 566.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	1768	6338--Inland Tutoring	5880--Instructional Vendors &	EFT	101060	120.00	120.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567693	5478--Inspired By Kingston	5880--Instructional Vendors &	EFT	100995	465.00	465.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566847	6318--Inspyr Arts Education	5880--Instructional Vendors &	EFT	100912	310.00	310.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566848	6128--Institute for Educational Advancement	5880--Instructional Vendors &	EFT	100854	315.00	315.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/7/2024	4/10/2024	1116840	1148--Institute for Excellence in Writing	4100--Textbooks & Core Curricu	EFT	20136004630	172.41	172.41	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567694	1304--Intro 2 Skateboarding LLC 1304--Intro 2 Skateboarding LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004754 20136004754	2,120.00 2,120.00	1,040.00 1,080.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268567695	5714--Irene School of Rhythmic Gymnastics	5880--Instructional Vendors &	EFT	101028	1,147.50	1,147.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	3/26/2024	5485	2327--Ivy Kids LLC	4100--Textbooks & Core Curricu	EFT	100821	43.95	43.95	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/9/2024 3/30/2024 4/10/2024	19386 19372 19395	1243--JaeKris Publishing, LLC 1243--JaeKris Publishing, LLC 1243--JaeKris Publishing, LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT EFT	100799 100799 100799	236.98 236.98 236.98	86.22 44.99 105.77	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 2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567666	2857--James Lowe	5880--Instructional Vendors &	EFT	100996	160.00	160.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/6/2024	B-268569230	6270--Jennifer Gentile 6270--Jennifer Gentile	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004758 20136004758	210.00 210.00	70.00 140.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/14/2024	B-268572325	2047--Jennifer Walton	5880--Instructional Vendors &	EFT	20136004776	140.00	140.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566856	2047--Jennifer Walton	5880--Instructional Vendors &	EFT	20136004667	1,100.00	1,100.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/15/2024	B-268572363	5835--Jill Hodges	5880--Instructional Vendors &	EFT	20136004778	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/26/2024	B-268567015	5835--Jill Hodges	5880--Instructional Vendors &	EFT	20136004745	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/23/2024	B-268566860	5890--Jill Sturkie	5880--Instructional Vendors &	EFT	100871	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	4/29/2024	B-268567038	1863--Jing Ma	5880--Instructional Vendors &	EFT	20136004736	115.29	115.29	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572326	4178--JKWInnovations	5880--Instructional Vendors &	EFT	101152	292.00	292.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/6/2024	B-268569231	4178--JKWInnovations	5880--Instructional Vendors &	EFT	101032	292.00	292.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/6/2024	B-268569232	1988--Joe Ferrante Music Academy	5880--Instructional Vendors &	EFT	20136004729	624.00	624.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

5/28/2024	5/10/2024	B-268572328	3278--Joobilo, LLC 3278--Joobilo, LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101097 101097	4,354.95 4,354.95	1,584.65 2,770.30	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268569227	3278--Joobilo, LLC 3278--Joobilo, LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100933 100933	8,090.28 8,090.28	4,354.36 3,735.92	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/6/2024	B-268569234	1954--Joyful Music and Arts	5880--Instructional Vendors &	EFT	20136004711	1,035.00	1,035.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024 4/30/2024	40255 40256	5257--Jump and Schout Therapy, Inc. 5257--Jump and Schout Therapy, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100901 100901	562.50 562.50	187.50 375.00	In Transit In Transit	907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/7/2024	3/31/2024 3/31/2024	39880 39881	5257--Jump and Schout Therapy, Inc. 5257--Jump and Schout Therapy, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100815 100815	843.75 468.75	375.00 468.75	In Transit In Transit	907--Special Education 907--Special Education	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/13/2024	4/29/2024	B-268566929	6230--Just Us Learners	5880--Instructional Vendors &	EFT	20136004655	660.00	660.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566930	v3067--K2 Studios, LLC v3067--K2 Studios, LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100851 100851	2,066.53 2,066.53	1,151.97 914.56	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566932	6116--Karate Foothill Ranch/Lake Forest	5880--Instructional Vendors &	EFT	100920	255.00	255.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566933	6117--Karate North Mission Viejo	5880--Instructional Vendors &	EFT	100915	235.00	235.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566934	3301--Karen J Smith	5880--Instructional Vendors &	EFT	20136004653	615.00	615.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567696	1397--Karis Academy	5880--Instructional Vendors &	EFT	20136004719	600.00	600.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567697	v3080--Kaser Arts v3080--Kaser Arts	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100953 100953	1,851.75 1,851.75	1,530.50 321.25	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572330	1052--Kathleen Elliott	5880--Instructional Vendors &	EFT	101083	550.00	550.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/17/2024	B-268572897	5674--KC Tutoring	5880--Instructional Vendors &	EFT	20136004815	1,815.00	1,815.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572331	5574--Kelly Saidvar Performance Horses	5880--Instructional Vendors &	EFT	20136004774	208.71	208.71	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/25/2024	B-268567594	4147--Kelsey Mira Slater	5880--Instructional Vendors &	EFT	101017	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/25/2024	B-268566935	1419--Kick It Up Kidz LLC	5880--Instructional Vendors &	EFT	20136004670	431.25	431.25	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/7/2024	4/25/2024	B-268564822	1419--Kick It Up Kidz LLC	5880--Instructional Vendors &	EFT	20136004642	50.00	50.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	5/1/2024	B-268566937	2288--Kicks Taekwondo Riverside Inc.	5880--Instructional Vendors &	EFT	100848	150.00	150.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566802	1949--Kids Art Pasadena	5880--Instructional Vendors &	EFT	100850	300.00	300.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/7/2024	4/5/2024	324	5277--Kids in Motion Pediatric Therapy 5277--Kids in Motion Pediatric Therapy	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100828 100828	776.25 776.25	472.50 303.75	In Transit In Transit	907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
5/28/2024	5/14/2024	B-268572332	6148--Kids' Club Spanish School 6148--Kids' Club Spanish School	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101145 101145	306.00 306.00	72.00 234.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/17/2024	B-268572890	2506--KidsArt Claremont Inc.	5880--Instructional Vendors &	EFT	101134	568.00	568.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/29/2024	B-268566812	3245--KidsArt Glendora Inc.	5880--Instructional Vendors &	EFT	100846	376.00	376.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268567698	4186--Kidz Golf Club	5880--Instructional Vendors &	EFT	20136004717	930.00	930.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/26/2024	B-268566940	6217--Kristen A Lewis 6217--Kristen A Lewis	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100862 100862	797.50 797.50	220.00 577.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	4/15/2024	1374	2276--KiwiCo., Inc. 2276--KiwiCo., Inc.	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	20136004765 20136004765	1,933.22 1,933.22	1,482.15 451.07	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/13/2024	4/29/2024	B-268566941	6069--KL Tutoring	5880--Instructional Vendors &	EFT	20136004650	340.50	340.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/27/2024	B-268566944	1873--Krav Mega of Orange County	5880--Instructional Vendors &	EFT	20136004679	396.97	396.97	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566945	6337--Kristopher Apple	5880--Instructional Vendors &	EFT	100897	240.00	240.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566949	6028--Kumon Math and Reading of Norco 6028--Kumon Math and Reading of Norco	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100902 100902	775.00 775.00	310.00 465.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/29/2024	B-268566764	4118--Kyungeun Christina Lee	5880--Instructional Vendors &	EFT	100927	450.00	450.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	4/22/2024 4/29/2024	4.15155E+11 4.48908E+11	2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials	4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT	101077 101077	619.61 619.61	545.37 74.24	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	4/24/2024 4/23/2024 4/25/2024	4.1339E+11 4.08682E+11 4.1339E+11	2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials	4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT EFT	101085 101085 101085	1,846.10 1,846.10 1,846.10	324.15 795.50 726.45	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 2073--Excel Academy Charter School - Helendale
5/28/2024	4/22/2024 4/22/2024	4.15548E+11 4.24133E+11	2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials	4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT	101132 101132	1,728.04 1,728.04	1,666.68 61.36	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
5/22/2024	4/22/2024 4/15/2024 4/17/2024 4/19/2024 4/16/2024 4/15/2024 4/19/2024 4/15/2024 4/16/2024	4.24171E+11 4.14594E+11 4.15168E+11 4.12968E+11 4.08508E+11 4.21529E+11 4.14597E+11 4.13358E+11	2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials	4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT EFT EFT EFT EFT EFT EFT	101011 101011 101011 101011 101011 101011 101011 101011	2,856.49 2,856.49 2,856.49 2,856.49 2,856.49 2,856.49 2,856.49 2,856.49	208.62 70.57 62.24 971.88 119.96 349.88 597.04 476.20	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	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/13/2024	4/17/2024 4/15/2024 4/16/2024 4/15/2024 4/16/2024 4/16/2024 4/16/2024 4/15/2024 4/16/2024 4/16/2024	4.1516E+11 4.04603E+11 4.08675E+11 4.04529E+11 4.12808E+11 4.13115E+11 4.09274E+11 4.04638E+11 4.08686E+11 4.08511E+11	2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials	4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT EFT EFT EFT EFT EFT EFT EFT EFT	100847 100847 100847 100847 100847 100847 100847 100847 100847	2,065.39 2,065.39 2,065.39 2,065.39 2,065.39 2,065.39 2,065.39 2,065.39 2,065.39	135.71 144.60 160.61 136.96 283.30 34.17 361.83 282.96 357.28 243.57	In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit In Transit	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 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 2073--Excel Academy Charter School - Helendale



5/7/2024	4/1/2024 4/12/2024 4/12/2024	3.65749E+11 3.62621E+11 4.01508E+11	2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials 2114--Lakeshore Learning Materials	4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT EFT	100812 100812 100812	1,468.53 1,468.53 1,468.53	196.35 913.09 359.09	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 2073--Excel Academy Charter School - Helendale
5/13/2024	5/2/2024	1465	4180--LanguageBird, Inc.	5880--Instructional Vendors &	EFT	20136004675	100.00	100.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566955	5529--Lanterns Global LLC	5880--Instructional Vendors &	EFT	100875	260.00	260.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572902	1936--Laurie Ellen Meinhold	5880--Instructional Vendors &	EFT	20136004809	252.00	252.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/3/2024 5/5/2024	9763 10337	5544--Law Offices of Young, Minney & Corr, LLP 5544--Law Offices of Young, Minney & Corr, LLP 5544--Law Offices of Young, Minney & Corr, LLP	5810--Legal 5810--Legal 5810--Legal	EFT EFT EFT	100876 100876 100876	9,642.56 9,642.56 9,642.56	71.25 716.25 9,455.06	In Transit In Transit In Transit	912--Administration/Office 912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/13/2024	3/31/2024 4/30/2024	16308780 16462253	5296--LEAF 5296--LEAF 5296--LEAF	5620--Equipment Leases 5620--Equipment Leases 5620--Equipment Leases	EFT EFT EFT	100892 100892 100892	302.11 302.11 302.11	89.19 54.67 60.14	In Transit In Transit In Transit	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
5/13/2024	4/30/2024	B-268566957	6278--Learn Beyond the Book LLC	5880--Instructional Vendors &	EFT	100942	543.85	543.85	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/25/2024	B-268566960	6244--Learning Squad OC	5880--Instructional Vendors &	EFT	100887	529.98	529.98	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567699	5484--Learning with Laurel	5880--Instructional Vendors &	EFT	20136004768	333.75	333.75	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	4/23/2024	INV201491	5298--Learning Without Tears	4100--Textbooks & Core Curricu	EFT	101079	11.00	11.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	4/19/2024	INV201291	5298--Learning Without Tears	4100--Textbooks & Core Curricu	EFT	101136	11.00	11.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/15/2024	INV200950	5298--Learning Without Tears	4100--Textbooks & Core Curricu	EFT	101059	11.00	11.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566963	4140--Legacy of Valor & Excellence	5880--Instructional Vendors &	EFT	100861	150.00	150.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/10/2024 4/10/2024 4/15/2024	1190602456 1190602457 1190602811	2056--LEGO Education 2056--LEGO Education 2056--LEGO Education	4310--Materials & Supplies 4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT EFT	100911 100911 100911	810.71 810.71 810.71	125.01 179.38 506.32	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 2073--Excel Academy Charter School - Helendale
5/7/2024	4/8/2024 4/11/2024	1190601867 1190602218	2056--LEGO Education 2056--LEGO Education	4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT	100798 100798	1,178.51 1,178.51	177.73 1,000.78	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	4/23/2024	268555972	5469--Let's Bake Baking Kits	4100--Textbooks & Core Curricu	EFT	101131	49.55	49.55	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	4/23/2024	268554077	5469--Let's Bake Baking Kits	4100--Textbooks & Core Curricu	EFT	101088	172.36	172.36	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/15/2024	B-268572333	6340--Lil' Dribblers LLC	5880--Instructional Vendors &	EFT	20136004793	650.00	650.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/3/2024	164	5302--Little Ears Therapy Center	5100--SpEd Consultants and Ven	EFT	100923	120.00	120.00	In Transit	907--Special Education	2073--Excel Academy Charter School - Helendale
5/7/2024	4/2/2024	163A	5302--Little Ears Therapy Center	5100--SpEd Consultants and Ven	EFT	100832	180.00	180.00	In Transit	Speech Services	907--Special Education
5/7/2024	3/28/2024	IN-000098056	1312--Little Passports	4100--Textbooks & Core Curricu	EFT	20136004640	206.80	206.80	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572350	5495--Little School of Music	5880--Instructional Vendors &	EFT	101125	1,019.00	1,019.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/14/2024	B-268572352	5535--Little Surf Co. 5535--Little Surf Co.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004802 20136004802	872.00 872.00	395.00 477.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/7/2024	4/12/2024	12708329	6317--Llmitas Spanish	4100--Textbooks & Core Curricu	EFT	20136004623	231.45	231.45	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	INV50551	5313--LogiCopy 5313--LogiCopy	5800--Professional Services - 5800--Professional Services -	EFT EFT	101156 101156	44.20 44.20	16.80 27.40	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567700	1928--Lorie Susan Suntree	5880--Instructional Vendors &	EFT	101050	457.00	457.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566966	6171--Lucky Duck Swim School	5880--Instructional Vendors &	EFT	100904	1,052.00	1,052.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	4/25/2024	US-2024-00232594	5899--Lulu Press, Inc.	4100--Textbooks & Core Curricu	EFT	101154	16.41	16.41	In Transit	908--Intervention/Title I	2053--Excel Academy Charter School - Warner
5/7/2024	4/9/2024	US-2024-00205266	5899--Lulu Press, Inc.	4100--Textbooks & Core Curricu	EFT	100836	16.65	16.65	In Transit	908--Intervention/Title I	2073--Excel Academy Charter School - Helendale
5/28/2024	5/14/2024	B-268572353	6176--Mamute Jiu Jitsu	5880--Instructional Vendors &	EFT	20136004786	145.00	145.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/30/2024	B-268566640	3084--Marcos Moscat	5880--Instructional Vendors &	EFT	100806	250.00	250.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/27/2024	B-268566969	4109--Maria's Learning Shop	5880--Instructional Vendors &	EFT	20136004662	100.00	100.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/24/2024	2450240324	5326--Marshall Ketchum	5100--SpEd Consultants and Ven	EFT	100941	368.00	368.00	In Transit	therapy Services	907--Special Education
5/13/2024	4/30/2024	B-268566990	5884--Master Lee's Kung Fu San Soo	5880--Instructional Vendors &	EFT	100872	159.00	159.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/3/2024	B-268567701	12580--Math Learning Woodbridge	5880--Instructional Vendors &	EFT	101068	350.00	350.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/29/2024	B-268566991	5521--Mathnasium of Anaheim Hills	5880--Instructional Vendors &	EFT	20136004658	299.00	299.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/28/2024	B-268566992	5712--Mathnasium of Chula Vista	5880--Instructional Vendors &	EFT	100938	1,206.00	1,206.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566993	5593--Mathnasium of Corona	5880--Instructional Vendors &	EFT	100889	329.00	329.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566994	6287--Mathnasium of Diamond Bar	5880--Instructional Vendors &	EFT	20136004673	389.00	389.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/15/2024	B-268572354	6384--Mathnasium of Huntington Beach	5880--Instructional Vendors &	EFT	20136004777	208.56	208.56	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/26/2024	B-268566995	v2672--Mathnasium of Mission Viejo	5880--Instructional Vendors &	EFT	100852	75.00	75.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566997	6241--Mathnasium of Riverside	5880--Instructional Vendors &	EFT	100921	398.00	398.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	5/1/2024	B-268566998	2993--Mathnasium of San Clemente	5880--Instructional Vendors &	EFT	100914	4,078.00	4,078.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268566999	6350--Mathnasium of Temecula	5880--Instructional Vendors &	EFT	20136004664	319.00	319.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/16/2024	8223	1260--McRuffy Press, LLC	4100--Textbooks & Core Curricu	EFT	101041	242.85	242.85	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

5/13/2024	3/21/2024 4/15/2024 4/15/2024	8202 8217 8218	1260--McRuffy Press, LLC 1260--McRuffy Press, LLC 1260--McRuffy Press, LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT EFT	100935 100935 100935	745.70 745.70 745.70	132.90 268.90 343.90	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
5/7/2024	3/27/2024 4/11/2024	8208 8216	1260--McRuffy Press, LLC 1260--McRuffy Press, LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	100837 100837	446.80 446.80	117.90 328.90	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567734	4127--Meena Yoon	5880--Instructional Vendors &	EFT	20136004738	850.00	850.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572356	3142--Melinda J. Beebe	5880--Instructional Vendors &	EFT	101089	180.00	180.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/15/2024	C237107	2538--Memoria Press 2538--Memoria Press	4100--Textbooks & Core Curricu 4310--Materials & Supplies	EFT EFT	101045 101045	120.48 120.48	71.82 48.66	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
5/28/2024	5/11/2024	B-268572357	1610--Michaela Shea Ackermann	5880--Instructional Vendors &	EFT	101098	825.00	825.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572358	5468--Michelle's Keys Piano Studio	5880--Instructional Vendors &	EFT	101150	160.00	160.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/4/2024	B-268569236	5468--Michelle's Keys Piano Studio	5880--Instructional Vendors &	EFT	100973	120.00	120.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567702	5844--Miss Candice's Dance Center 5844--Miss Candice's Dance Center	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004690 20136004690	440.00 440.00	120.00 320.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567000	2244--Miss Crady the Math Lady 2244--Miss Crady the Math Lady	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004688 20136004688	1,601.25 1,601.25	614.50 986.75	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572359	1896--Mission Renaissance 1896--Mission Renaissance	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101111 101111	880.63 880.63	239.00 641.63	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567001	1896--Mission Renaissance 1896--Mission Renaissance	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101029 101029	719.60 719.60	239.00 480.60	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572402	5577--Mission Viejo Family YMCA	5880--Instructional Vendors &	EFT	101076	700.00	700.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/16/2024	4/29/2024 3/26/2024	B-268567002 B-268541205-2	v3072--Modern Music Studio v3072--Modern Music Studio	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100943 100943	260.00 260.00	130.00 130.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
5/22/2024	4/26/2024	B-268567003	1550--Monica D Basurto 1550--Monica D Basurto	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100987 100987	1,122.00 1,122.00	364.00 758.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	4/22/2024	B-268567004	6024--Monica L. Silvey	5880--Instructional Vendors &	EFT	20136004730	1,200.00	1,200.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567704	5816--Monrovia Music Academy	5880--Instructional Vendors &	EFT	100964	358.00	358.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	290772 4/15/2024 290783	290772 290783	1293--Moving Beyond the Page 1293--Moving Beyond the Page	4100--Textbooks & Core Curricu 4310--Materials & Supplies	EFT EFT	100918 100918	129.10 129.10	92.46 36.64	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/7/2024	4/11/2024	290707	1293--Moving Beyond the Page	4100--Textbooks & Core Curricu	EFT	100827	547.48	547.48	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/19/2024	11467	1391--MoxieBox Art, Inc.	4100--Textbooks & Core Curricu	EFT	101006	86.89	86.89	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/16/2024	11462	1391--MoxieBox Art, Inc.	4100--Textbooks & Core Curricu	EFT	100884	49.04	49.04	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/7/2024	4/5/2024	11326	1391--MoxieBox Art, Inc.	4100--Textbooks & Core Curricu	EFT	100826	133.36	133.36	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	4/4/2024	1759	v3068--Mr. D Math, LLC	5880--Instructional Vendors &	EFT	101078	145.00	145.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/4/2024	B-268569237	6133--Murphy Language Arts LLC	5880--Instructional Vendors &	EFT	101000	311.25	311.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572360	5557--Music Lessons with Jena	5880--Instructional Vendors &	EFT	101149	140.00	140.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567006	5557--Music Lessons with Jena	5880--Instructional Vendors &	EFT	100981	915.00	915.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/9/2024	EXCEL2122-0005	5527--Music Library	4100--Textbooks & Core Curricu	EFT	20136004637	120.00	120.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567707	3305--Music Maker Inc.	5880--Instructional Vendors &	EFT	20136004740	801.00	801.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/30/2024	B-268565360	3308--My Learning Studio	5880--Instructional Vendors &	EFT	20136004627	98.00	98.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	4/20/2024 4/20/2024	6DF038CF-0007 6DF038CF-0006	6168--My ZOO Box 6168--My ZOO Box	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	100980 100980	167.75 167.75	47.90 119.85	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567709	6141--N-Pac LLC	5880--Instructional Vendors &	EFT	100952	416.25	416.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572361	6110--Nancy's Spanish Creative	5880--Instructional Vendors &	EFT	101093	300.00	300.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569238	2877--Nataly Jewel	5880--Instructional Vendors &	EFT	20136004767	189.59	189.59	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/19/2024 4/9/2024	195394B 195394A	2603--Nature Watch (Winds on Education Inc) 2603--Nature Watch (Winds on Education Inc)	4310--Materials & Supplies 4310--Materials & Supplies	EFT EFT	100997 100997	314.07 314.07	12.82 301.25	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
5/22/2024	4/26/2024	B-268567007	3005--New California Conservatory of Music 3005--New California Conservatory of Music	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004770 20136004770	1,522.22 1,522.22	80.00 1,442.22	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567713	3109--New Modern Music School US Inc.	5880--Instructional Vendors &	EFT	101026	1,134.00	1,134.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/7/2024	B-268569239	5802--Newport Seabase	5880--Instructional Vendors &	EFT	101010	660.00	660.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567008	v3090--Nicole Fredericks	5880--Instructional Vendors &	EFT	20136004706	615.00	615.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/19/2024	8081	2699--Nicole the Math Lady, LLC.	4100--Textbooks & Core Curricu	EFT	100971	79.00	79.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268569241	6159--Nino's Art Studio 6159--Nino's Art Studio	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100990 100990	215.00 215.00	105.00 110.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/10/2024	B-268572362	6034--Nelle Fitness	5880--Instructional Vendors &	EFT	101120	120.00	120.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/17/2024	115549	5826--NOEO Science	4100--Textbooks & Core Curricu	EFT	101064	289.18	289.18	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567009	1022--Noonan Family Swim School Murrieta	5880--Instructional Vendors &	EFT	101044	589.00	589.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

5/13/2024	4/30/2024	B-268567014	1698--Noonan Family Swim School San Diego	5880--Instructional Vendors & EFT	100886	864.00	864.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/28/2024	5/15/2024	B-268572898	5532--Nuestra Escuela Spanish Academy 5532--Nuestra Escuela Spanish Academy	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	101106 101106	1,495.28 1,495.28	278.00 1,217.28	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
5/22/2024	1/19/2024	300131	1224--Oak Meadow Inc 1224--Oak Meadow Inc	4100--Textbooks & Core Curricu 4310--Materials & Supplies	EFT EFT	100984 100984	248.28 248.28	94.40 153.88	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
5/7/2024	4/10/2024	301093	1224--Oak Meadow Inc	4100--Textbooks & Core Curricu	EFT	100839	130.14	130.14	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	5/1/2024	B-268567018	4137--Olive Tree Education 4137--Olive Tree Education	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	100937 100937	5,881.67 5,881.67	4,604.25 1,277.42	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
5/28/2024	5/9/2024	B-268570435	1377--Olympia Training Center 1377--Olympia Training Center	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	20136004795 20136004795	1,919.50 1,919.50	750.00 1,169.50	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
5/13/2024	4/25/2024	B-268567019	v3093--One Jiu Jitsu and Fitness	5880--Instructional Vendors & EFT	20136004671	1,912.00	1,912.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/28/2024	5/11/2024	B-268572364	6163--One World Many Views - Discover Art	5880--Instructional Vendors & EFT	101133	240.00	240.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	4/29/2024	B-268567035	5995--Online AYCVLOGIC Coding Academy for Kid	5880--Instructional Vendors & EFT	20136004674	270.00	270.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/28/2024	5/15/2024	B-268572365	6045--OnPush Creative	5880--Instructional Vendors & EFT	20136004785	500.00	500.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/28/2024	5/20/2024	2552	5349--OPS 5349--OPS	9330--Prepaid Expenses 9330--Prepaid Expenses	EFT EFT	101071 101071	24,947.19 24,947.19	9,479.93 15,467.26	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/6/2024 5/8/2024	B-268569242 B-268570037	1500--Optimus Learning School 1500--Optimus Learning School	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	20136004753 20136004753	400.00 400.00	300.00 100.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner	
5/7/2024	4/25/2024	539	6380--Orange Coast College 6380--Orange Coast College 6380--Orange Coast College	9388--Parent PayPal Account 5835--Field Trips 5835--Field Trips	EFT EFT EFT	100802 100802 100802	515.00 515.00 515.00	330.00 120.00 65.00	In Transit In Transit In Transit	000--Schoolwide - Revenues/BS 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268567036	1413--Orange County Ki Society	5880--Instructional Vendors & EFT	100855	65.00	65.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/28/2024	5/17/2024	B-268572900	2372--Outschool	5880--Instructional Vendors & EFT	101140	40.00	40.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/28/2024	5/10/2024	B-268570436	2372--Outschool 2372--Outschool	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	101084 101084	2,505.00 2,505.00	1,050.00 1,455.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
5/22/2024	5/3/2024	B-268567711	2372--Outschool 2372--Outschool	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	101057 101057	1,293.00 1,293.00	226.00 1,067.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
5/28/2024	5/14/2024	B-268572366	6285--Ovation School for the Performing Arts 6285--Ovation School for the Performing Arts	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	101153 101153	1,350.00 1,350.00	675.00 675.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
5/28/2024	4/30/2024 4/30/2024 4/30/2024	164119 164118 164117	v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT EFT	101157 101157 101157	10,832.90 10,832.90 10,832.90	1,404.00 1,092.50 1,111.50	In Transit In Transit In Transit	907--Special Education 907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
			v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT EFT	101157 101157 101157	10,832.90 10,832.90 10,832.90	2,086.20 1,499.16 1,390.80	In Transit In Transit In Transit	907--Special Education 907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale
			v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT EFT	101157 101157 101157	10,832.90 10,832.90 10,832.90	2,248.74 1,800.90 2,464.02	In Transit In Transit In Transit	907--Special Education Group Services 907--Special Education	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/7/2024	3/31/2024 3/31/2024 3/31/2024	163797 163798 163768	v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT EFT	100835 100835 100835	10,413.08 10,413.08 10,413.08	1,800.90 2,464.02 1,200.60	In Transit In Transit In Transit	907--Special Education Group Services 907--Special Education	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
			v3100--Oxford Consulting Services, Inc. v3100--Oxford Consulting Services, Inc.	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100835 100835	10,413.08 10,413.08	1,642.68 1,540.50	In Transit In Transit	907--Special Education SAI Services	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572367	6343--Oz Academy of Music	5880--Instructional Vendors & EFT	101116	240.00	240.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	5/1/2024	B-268567037	3364--Pacific Ballet Conservatory	5880--Instructional Vendors & EFT	100919	765.10	765.10	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/8/2024	B-268569342	6152--Pakua, LLC	5880--Instructional Vendors & EFT	100991	272.50	272.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	4/15/2024	180783	1193--Paper Scissors Stone	4310--Materials & Supplies	EFT	100840	38.74	38.74	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567712	v3083--Parnassus Preparatory Academy	5880--Instructional Vendors & EFT	20136004771	2,345.30	2,345.30	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/13/2024	3/31/2024	57788	5353--Partners in Special Education	5100--SpEd Consultants and Ven	EFT	100864	357.50	357.50	In Transit	907--Special Education	2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567714	5571--PAVE School of the Arts	5880--Instructional Vendors & EFT	101065	590.00	590.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	6/6/2024	B-268569243	v3032--Peace Hill Classical Co-op LLC v3032--Peace Hill Classical Co-op LLC	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	100999 100999	2,732.00 2,732.00	345.00 2,387.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
5/22/2024	5/1/2024	B-268567515	5881--Peace Love & Dance, LLC	5880--Instructional Vendors & EFT	20136004735	2,088.13	2,088.13	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	6/6/2024	B-268569245	6319--Peter Brown Piano Studio	5880--Instructional Vendors & EFT	101049	280.00	280.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	5/1/2024	B-268567516	1779--Phoenix Feather Inc.	5880--Instructional Vendors & EFT	100963	130.00	130.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	4/29/2024	B-268567519	2132--Piano Studio of Natalie Warren	5880--Instructional Vendors & EFT	20136004663	202.00	202.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	4/27/2024	1025248462	5360--Pitney Bowes Global Financial Services LLC 5360--Pitney Bowes Global Financial Services LLC	5620--Equipment Leases 5620--Equipment Leases	EFT EFT	100925 100925	17.99 17.99	11.15 6.84	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/16/2024	B-268572904	5514--Pleasant Street Stable	5880--Instructional Vendors & EFT	101123	360.00	360.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	5/6/2024	B-268569247	6094--POM Tutors	5880--Instructional Vendors & EFT	100948	2,347.00	2,347.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	4/30/2024	B-268567521	1648--Portal Languages Fullerton LLC	5880--Instructional Vendors & EFT	101061	137.50	137.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/1/2024	B-268567527	1902--Precision Gymnastics 1902--Precision Gymnastics	5880--Instructional Vendors & EFT 5880--Instructional Vendors & EFT	101052 101052	640.00 640.00	195.00 445.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
5/7/2024	4/23/2024	887062	5363--Procopio, Cory, Hargreaves & Savitch LLP 5363--Procopio, Cory, Hargreaves & Savitch LLP	5810--Legal 5810--Legal	EFT EFT	100811 100811	273.40 273.40	169.51 103.89	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567529	6359--Prospect Soccer Academy	5880--Instructional Vendors & EFT	20136004761	1,050.00	1,050.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/7/2024	4/26/2024	B-268564824	2507--Protege Education	5880--Instructional Vendors & EFT	20136004624	250.00	250.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	



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5/13/2024	4/30/2024	B-268567536	2298--Riverside Aquatics Association	5880--Instructional Vendors &	EFT	20136004644	470.45	470.45	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/30/2024	B-268567537	5453--Riverside Ballet Arts	5880--Instructional Vendors &	EFT	100900	540.00	540.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/24/2024	B-268567538	2381--Robin Nesom Young	5880--Instructional Vendors &	EFT	20136004757	315.00	315.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/17/2024	B-268572905	3078--Rock Creek Education Center	5880--Instructional Vendors &	EFT	20136004807	445.00	445.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567539	5589--Rock Fitness	5880--Instructional Vendors &	EFT	101002	680.00	680.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572906	3310--Rockside Music Inc	5880--Instructional Vendors &	EFT	20136004803	360.00	360.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/29/2024	B-268567542	v3084--Rockstars of Tomorrow Riverside	5880--Instructional Vendors &	EFT	100877	1,237.50	1,237.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567541	2107--Rockstars of Tomorrow, Inc - Norco	5880--Instructional Vendors &	EFT	101037	310.00	310.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567540	3306--Rockstars of Tomorrow, Inc. - Chino Hills	5880--Instructional Vendors &	EFT	100945	465.00	465.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268567716	2315--Roos Music	5880--Instructional Vendors &	EFT	20136004733	390.00	390.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567543	1877--Rose Bowl Aquatics Center [S]	5880--Instructional Vendors &	EFT	100960	300.00	300.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	4/29/2024	B-268567544	1926--Royce Gracie Jiu Jitsu Academy	5880--Instructional Vendors &	EFT	20136004701	98.00	98.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567546	5580--Russian School of Mathematics Irvine	5880--Instructional Vendors &	EFT	101056	491.00	491.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567547	5941--Russian School of Mathematics South Orar	5880--Instructional Vendors &	EFT	100992	440.00	440.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/8/2024	B-268569345	6360--Safe Swim Academy	5880--Instructional Vendors &	EFT	100951	575.00	395.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567549	6360--Safe Swim Academy	5880--Instructional Vendors &	EFT	100951	575.00	180.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/15/2024	SINV-177321	6053--Sage Intacct, Inc.	9330--Prepaid Expenses	EFT	20136004712	48,643.20	18,484.42	In Transit	912--Administration/Office	2073--Excel Academy Charter School - Helendale
5/29/2024	5/26/2024	5367-052624	6053--Sage Intacct, Inc.	9330--Prepaid Expenses	EFT	20136004712	48,643.20	30,158.78	In Transit	912--Administration/Office	2053--Excel Academy Charter School - Warner
5/29/2024	5/26/2024	5367-052624	5367--San Bernardino Superintendent Of Schools	9525--STRS	Printed Check	30108	80,348.11	80,348.11	In Transit	000--Schoolwide--Revenues/BS	2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567550	6038--San Clemente Dance & Performing Arts Ce	5880--Instructional Vendors &	EFT	20136004696	85.00	85.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	5/1/2024	2964	6280--Schola Inc.	5841--Community Marketing	EFT	20136004622	3,500.00	2,170.00	In Transit	913--Marketing	2053--Excel Academy Charter School - Warner
5/7/2024	5/1/2024	2964	6280--Schola Inc.	5841--Community Marketing	EFT	20136004622	3,500.00	3,500.00	In Transit	913--Marketing	2073--Excel Academy Charter School - Helendale
5/13/2024	4/17/2024	59439803	1290--Scholastic Inc.	4310--Materials & Supplies	EFT	100939	112.06	112.06	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	0141814-IN	5756--School Services of California, Inc.	5300--Dues & Memberships	EFT	100950	355.00	134.90	In Transit	912--Administration/Office	2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	0141814-IN	5756--School Services of California, Inc.	5300--Dues & Memberships	EFT	100950	355.00	220.10	In Transit	912--Administration/Office	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572371	6345--Science Mom LLC	5880--Instructional Vendors &	EFT	101151	50.00	50.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567553	1027--Science-2-U	5880--Instructional Vendors &	EFT	100994	3,935.75	611.55	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567553	1027--Science-2-U	5880--Instructional Vendors &	EFT	100994	3,935.75	3,324.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567717	5548--Sektor Jiu-Jitsu	5880--Instructional Vendors &	EFT	100978	1,391.00	481.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567717	5548--Sektor Jiu-Jitsu	5880--Instructional Vendors &	EFT	100978	1,391.00	1,391.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	4/30/2024	B-268566939	4107--Shinja Kim	5880--Instructional Vendors &	EFT	20136004660	826.76	826.76	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	4/22/2024	8319	1262--Signing Online, LLC	4100--Textbooks & Core Curricu	EFT	101086	145.00	145.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572372	2880--Signing the Gap	5880--Instructional Vendors &	EFT	20136004811	63.00	63.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567718	2880--Signing the Gap	5880--Instructional Vendors &	EFT	20136004700	63.00	63.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/14/2024	B-268572377	5726--Silva Jiu-Jitsu Academy	5880--Instructional Vendors &	EFT	101073	596.00	596.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/15/2024	S312450	1208--Singapore Math Inc	4100--Textbooks & Core Curricu	EFT	100882	31.53	31.53	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/10/2024	S311971	1208--Singapore Math Inc	4100--Textbooks & Core Curricu	EFT	100819	388.90	193.40	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/7/2024	4/9/2024	S311858	1208--Singapore Math Inc	4100--Textbooks & Core Curricu	EFT	100819	388.90	195.50	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/13/2024	3/5/2024	4681	5556--Small Talk OC	5100--SpEd Consultants and Ven	EFT	100926	4,722.50	1,522.50	In Transit	907--Special Education	2053--Excel Academy Charter School - Warner
5/13/2024	3/7/2024	4682	5556--Small Talk OC	5100--SpEd Consultants and Ven	EFT	100926	4,722.50	1,200.00	In Transit	907--Special Education	2053--Excel Academy Charter School - Warner
5/13/2024	3/7/2024	4682	5556--Small Talk OC	5100--SpEd Consultants and Ven	EFT	100926	4,722.50	2,000.00	In Transit	907--Special Education	2053--Excel Academy Charter School - Warner
5/22/2024	5/6/2024	B-268569249	6036--Sokol Gymnastics LLC	5880--Instructional Vendors &	EFT	101035	140.00	140.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268569250	1412--South Coast Conservatory	5880--Instructional Vendors &	EFT	20136004693	850.00	850.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567554	3365--South Coast Repertory, Inc.	5880--Instructional Vendors &	EFT	101047	280.00	280.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/3/2024	B-268567719	1874--South County Dance Inc.	5880--Instructional Vendors &	EFT	100959	817.50	817.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567555	v3029--South OC Hybrid Homeschool	5880--Instructional Vendors &	EFT	100998	280.00	280.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	4/29/2024	B-268567556	5948--South Shore Jiu Jitsu & MMA	5880--Instructional Vendors &	EFT	101004	125.00	125.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/3/2024	B-268567720	5487--Southland Ballet Academy	5880--Instructional Vendors &	EFT	101005	645.00	645.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572378	2583--Spanish Advantage	5880--Instructional Vendors &	EFT	20136004810	890.00	150.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572378	2583--Spanish Advantage	5880--Instructional Vendors &	EFT	20136004810	890.00	740.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268567722	2583--Spanish Advantage	5880--Instructional Vendors &	EFT	20136004722	1,196.25	512.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/3/2024	B-268567722	2583--Spanish Advantage	5880--Instructional Vendors &	EFT	20136004722	1,196.25	683.75	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567557	4111--Spanish Time 123	5880--Instructional Vendors &	EFT	20136004766	200.00	200.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	3/31/2024	324	5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants and Ven	EFT	101046	1,780.63	761.25	In Transit	907--Special Education	2073--Excel Academy Charter School - Helendale
5/22/2024	3/31/2024	EXGL01-0324	5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants and Ven	EFT	101046	1,780.63	678.13	In Transit	907--Special Education	2053--Excel Academy Charter School - Warner
5/22/2024	3/31/2024	EXGL01-0324	5378--Specialized Therapy Services, Inc.	5100--SpEd Consultants and Ven	EFT	101046	1,780.63	341.25	In Transit	907--Special Education	2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567560	1540--Stagelight Performing Arts	5880--Instructional Vendors &	EFT	20136004723	120.00	120.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	4/20/2024	6001327855	1264--Staples	4310--Materials & Supplies	EFT	20136004707	847.60	33.93	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale



Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

4/20/2024	6001327858	1264--Staples	4310--Materials & Supplies	EFT	20136004707	847.60	568.31	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale		
4/20/2024	6001327853	1264--Staples	4310--Materials & Supplies	EFT	20136004707	847.60	43.71	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale		
4/20/2024	6001327852	1264--Staples	4310--Materials & Supplies	EFT	20136004707	847.60	117.31	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale		
4/27/2024	6001734177	1264--Staples	4310--Materials & Supplies	EFT	20136004707	847.60	84.34	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale		
5/28/2024	5/15/2024	B-268572379	3012--Stars Gymnastics LLC	5880--Instructional Vendors &	EFT	20136004798	424.12	424.12	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	5/1/2024	B-268567562	3012--Stars Gymnastics LLC	5880--Instructional Vendors &	EFT	20136004747	408.00	408.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	4/26/2024	B-268567564	5473--STEAM Academy 5473--STEAM Academy	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004726	1,755.71 1,755.71	150.00 1,605.71	In Transit In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
5/1/2024	4/9/2024	501992-B	2129--Studies Weekly	4100--Textbooks & Core Curricu	EFT	100838	43.44	43.44	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	4/29/2024	B-268567566	6234--Sundae Music Group LLC	5880--Instructional Vendors &	EFT	20136004694	510.00	510.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/28/2024	5/15/2024	B-268572380	5688--Sundance Hills Equestrian Center LLC	5880--Instructional Vendors &	EFT	101075	135.00	135.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/2/2024	B-268567724	5833--Susan Sanders	5880--Instructional Vendors &	EFT	100977	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/28/2024	5/9/2024	B-268570437	1491--Sylvan Learning Corona Norco 1491--Sylvan Learning Corona Norco	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101129	2,410.00 2,410.00	994.00 1,416.00	In Transit In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
5/22/2024	4/29/2024	B-268567567	2086--Sylvan Learning of Torrance	5880--Instructional Vendors &	EFT	100958	126.00	126.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	4/30/2024	B-268567569	6178--Sylvia's Design Studio	5880--Instructional Vendors &	EFT	20136004763	280.00	280.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	4/23/2024	B-268567570	v3037--Taryn Sains	5880--Instructional Vendors &	EFT	101067	655.00	655.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	4/17/2024	263767266	5395--TeachersPayTeachers	4100--Textbooks & Core Curricu	EFT	100843	217.28	109.69	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	4/16/2024	263698933	5395--TeachersPayTeachers	4100--Textbooks & Core Curricu	EFT	100843	217.28	107.59	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/1/2024	4/5/2024	262548354	5395--TeachersPayTeachers	4310--Materials & Supplies	EFT	100834	113.18	113.18	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/2/2024	B-268567725	6188--Telos Academy	5880--Instructional Vendors &	EFT	101018	475.60	475.60	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	5/3/2024	B-268567727	5998--Temecula Music Teacher LLC	5880--Instructional Vendors &	EFT	100979	274.00	274.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/7/2024	B-268569251	10711--Terra Arts Foundation 10711--Terra Arts Foundation	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100970	6,827.30 6,827.30	1,492.30 5,335.00	In Transit In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
5/22/2024	4/29/2024	B-268567571	5682--The Art House 5682--The Art House	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101039	1,389.50 1,389.50	130.00 1,259.50	In Transit In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
5/22/2024	5/4/2024	B-268569252	5886--The Backyard Schoolhouse	5880--Instructional Vendors &	EFT	101051	75.00	75.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/1/2024	B-268567573	1917--The Center Stage Studio	5880--Instructional Vendors &	EFT	101021	1,007.00	1,007.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	4/24/2024	B-268567574	6181--The Coder School Corona	5880--Instructional Vendors &	EFT	20136004756	1,883.25	1,883.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/28/2024	5/16/2024	B-268572908	5702--The Coder School Mission Viejo	5880--Instructional Vendors &	EFT	101095	269.00	269.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	4/29/2024	B-268567576	6237--The Coder School Redondo Beach/Torranc	5880--Instructional Vendors &	EFT	101027	798.00	798.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	5/2/2024	B-268567668	1984--The Colburn School	5880--Instructional Vendors &	EFT	20136004743	415.77	415.77	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/28/2024	4/18/2024	SI-206269	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	101130	12.98	12.98	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	4/18/2024	SI-206275	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	101070	210.13	210.13	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/1/2024	4/12/2024	SI-205949	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	100800	20.00	20.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	5/2/2024	B-268567728	3302--The Music Abode	5880--Instructional Vendors &	EFT	20136004725	400.00	400.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	4/30/2024	B-268567578	6321--The Red Apple Project	5880--Instructional Vendors &	EFT	100974	1,201.25	1,201.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	4/24/2024	EX2024.04	5400--Therapy in Action	5100--SpEd Consultants and Ven	EFT	100867	550.00	550.00	In Transit	907--Special Education	2073--Excel Academy Charter School - Helendale	
5/22/2024	3/22/2024	133604	4223--Think Outside LLC	4100--Textbooks & Core Curricu	EFT	101038	148.70	148.70	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/1/2024	4/5/2024	133727	4223--Think Outside LLC	4100--Textbooks & Core Curricu	EFT	100817	136.00	136.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/13/2024	4/16/2024	207393	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	100917	155.35	155.35	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/7/2024	B-268569235	2021--Three Little Chefs, Inc.	5880--Instructional Vendors &	EFT	20136004716	599.25	599.25	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/2/2024	B-268567729	2117--Thrive Academics, Inc	5880--Instructional Vendors &	EFT	100989	50.00	50.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	5/1/2024	B-268567730	1409--To the Pointe Dance Productions	5880--Instructional Vendors &	EFT	20136004769	592.00	592.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/22/2024	4/29/2024	B-268567582	6014--TOCA Soccer	5880--Instructional Vendors &	EFT	101062	1,177.00	1,177.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	4/29/2024	B-268567583	3086--Torres Fine Arts Instruction	5880--Instructional Vendors &	EFT	20136004703	275.00	275.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/13/2024	4/9/2024	7683578	5411--Total Education Solutions 5411--Total Education Solutions	5100--SpEd Consultants and Ven 5100--SpEd Consultants and Ven	EFT EFT	100906	412.50 412.50	142.50 270.00	In Transit In Transit	SAI Services APE Services	907--Special Education 907--Special Education	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/1/2024	4/9/2024	7683577	5411--Total Education Solutions	5100--SpEd Consultants and Ven	EFT	100801	1,215.00	1,215.00	In Transit	APE Services	907--Special Education	2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569253	2798--Traditional Equestrian School	5880--Instructional Vendors &	EFT	20136004744	352.00	352.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
5/1/2024	4/30/2024	B-268566641	2717--Tree of Knowledge 2717--Tree of Knowledge	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100829	1,815.00 1,815.00	1,265.00 550.00	In Transit In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
5/28/2024	5/15/2024	B-268572382	6311--Trinity Therapeutic Riding Center, Inc.	5880--Instructional Vendors &	EFT	101087	3,150.00	3,150.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	4/29/2024	B-268567585	6193--True Strength Boxing	5880--Instructional Vendors &	EFT	20136004737	900.00	900.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
5/22/2024	5/1/2024	B-268567588	5877--Ultra Jiu Jitsu Academy 5877--Ultra Jiu Jitsu Academy	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004728	855.00 855.00	360.00 495.00	In Transit In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
5/28/2024	5/18/2024	00002E01V5204	1649--UPS	5930--Postage	EFT	101155	332.71	126.43	In Transit	912--Administration/Office	2073--Excel Academy Charter School - Helendale	

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday June 13, 2024 at 11:55 AM

			1649--UPS	5930--Postage	EFT	101155	332.71	206.28	In Transit	912--Administration/Office	2053--Excel Academy Charter School - Warner
5/22/2024	5/11/2024	00002E01V5194	1649--UPS 1649--UPS	5930--Postage 5930--Postage	EFT EFT	101012 101012	97.65 97.65	60.54 37.11	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/13/2024	5/4/2024	00002E01V5184	1649--UPS 1649--UPS	5930--Postage 5930--Postage	EFT EFT	100858 100858	558.04 558.04	212.06 345.98	In Transit In Transit	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/11/2024	4/27/2024	00002E01V5174	1649--UPS 1649--UPS	5930--Postage 5930--Postage	EFT EFT	100824 100824	436.79 436.79	270.81 165.98	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	4/24/2024	B-268567590	5717--Urban Youth Park	5880--Instructional Vendors &	EFT	100985	220.00	220.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/11/2024	4/20/2024	B-268563772	5717--Urban Youth Park	5880--Instructional Vendors &	EFT	100833	480.00	480.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/7/2024	B-268569254	2211--Valerie Marich Music	5880--Instructional Vendors &	EFT	100949	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/15/2024	B-268572909	5875--Valley Wide Elite Gymnastics	5880--Instructional Vendors &	EFT	20136004782	1,098.00	1,098.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/17/2024	B-268572910	v3112--VCMA Villatoro Champion Martial Arts v3112--VCMA Villatoro Champion Martial Arts	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101135 101135	734.00 734.00	198.00 536.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	4/28/2024	9962808675	5421--Verizon Wireless 5421--Verizon Wireless	5910--Telephone 5910--Telephone	EFT EFT	101024 101024	865.08 865.08	536.35 328.73	In Transit In Transit	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/14/2024	B-268572381	2738--Veronica Gutierrez	5880--Instructional Vendors &	EFT	20136004814	67.50	67.50	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/11/2024	B-268572383	2627--Veronica Richards Violin Studio	5880--Instructional Vendors &	EFT	101101	150.00	150.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/11/2024	4/11/2024	730015	2168--Vex Robotics	4310--Materials & Supplies	EFT	100823	260.80	260.80	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572384	4197--Victoria Knell 4197--Victoria Knell	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101139 101139	1,539.39 1,539.39	740.00 799.39	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	5/1/2024	B-268567593	5581--Victory Aquatics	5880--Instructional Vendors &	EFT	20136004684	180.00	180.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569255	2959--Victory Tae Kwon Do USA	5880--Instructional Vendors &	EFT	20136004714	360.00	360.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/6/2024	B-268569256	6134--Virtues Art Academy	5880--Instructional Vendors &	EFT	20136004751	150.00	150.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/12/2024	B-268572385	2127--Waterfront Education 2127--Waterfront Education	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004808 20136004808	2,010.00 2,010.00	630.00 1,380.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/22/2024	5/1/2024	B-268567596	2202--Watersafe Swim School Inc. 2202--Watersafe Swim School Inc.	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004734 20136004734	1,314.00 1,314.00	640.00 674.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572387	1387--Waterworks Aquatics HB	5880--Instructional Vendors &	EFT	101119	3,136.72	3,136.72	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572388	1389--Waterworks Aquatics Irvine	5880--Instructional Vendors &	EFT	101138	5,221.90	5,221.90	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/13/2024	B-268572389	2144--Waterworks Aquatics Pasadena	5880--Instructional Vendors &	EFT	101114	1,931.36	1,931.36	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572390	6143--Waterworks Swim School Chino Hills 6143--Waterworks Swim School Chino Hills	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101105 101105	2,362.42 2,362.42	295.50 2,066.92	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572393	5902--Waterworks Swim School Diamond Bar	5880--Instructional Vendors &	EFT	101096	497.75	497.75	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572394	5919--Waterworks Swim School La Habra 5919--Waterworks Swim School La Habra	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101142 101142	360.18 360.18	141.18 219.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
5/28/2024	5/13/2024	B-268572395	5649--Waterworks Swim School Yorba Linda	5880--Instructional Vendors &	EFT	101121	2,070.44	2,070.44	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/5/2024	B-268569257	1761--We Spark Learning	5880--Instructional Vendors &	EFT	100967	74.00	74.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/11/2024	3/21/2024	1935	5443--Well-Trained Mind Academy, Inc.	4100--Textbooks & Core Curricu	EFT	20136004619	116.00	116.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/8/2024	B-268570039	5763--West Coast Krav Maga Murrieta	5880--Instructional Vendors &	EFT	100993	756.00	756.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/8/2024	B-268570040	2341--West Coast Krav Maga Temecula	5880--Instructional Vendors &	EFT	101055	567.00	567.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/28/2024	5/9/2024	B-268570438	5764--West Coast Krav Maga Wildomar, Inc.	5880--Instructional Vendors &	EFT	101143	378.00	378.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/9/2024	B-268570041	5764--West Coast Krav Maga Wildomar, Inc.	5880--Instructional Vendors &	EFT	100966	567.00	567.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/13/2024	4/24/2024	B-268566928	2337--Wildcats Hockey LLC 2337--Wildcats Hockey LLC	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100896 100896	3,183.75 3,183.75	1,210.00 1,973.75	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	4/16/2024	INV54476	6102--Wilson Language Training Corporation	4100--Textbooks & Core Curricu	EFT	101023	78.04	78.04	In Transit	908--Intervention/Title I	2053--Excel Academy Charter School - Warner
5/13/2024	4/11/2024	INV54233	6102--Wilson Language Training Corporation	4100--Textbooks & Core Curricu	EFT	100932	96.70	96.70	In Transit	908--Intervention/Title I	2053--Excel Academy Charter School - Warner
5/28/2024	5/15/2024	B-268572396	6009--Winners Circle Athletics	5880--Instructional Vendors &	EFT	101118	450.00	450.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/2/2024	B-268567731	6009--Winners Circle Athletics 6009--Winners Circle Athletics	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	100976 100976	2,116.00 2,116.00	466.00 1,650.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/28/2024	5/14/2024	B-268572397	1033--WM Music Lessons	5880--Instructional Vendors &	EFT	20136004791	240.00	240.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	4/30/2024	B-268567597	1033--WM Music Lessons 1033--WM Music Lessons	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004689 20136004689	3,268.00 3,268.00	1,248.00 2,020.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/22/2024	4/30/2024	B-268567598	4121--Wm Tutoring Services 4121--Wm Tutoring Services	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004691 20136004691	920.00 920.00	200.00 720.00	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner
5/11/2024	4/13/2024	E015	3213--Wonder Crate	4100--Textbooks & Core Curricu	EFT	100831	99.95	99.95	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024 5/6/2024	B-268567732 B-268569258	2092--World Elite Gymnastics 2092--World Elite Gymnastics	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	101042 101042	719.80 719.80	112.00 607.80	In Transit In Transit	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner
5/28/2024	5/10/2024	B-268572401	3212--WriteAtHome, Inc.	5880--Instructional Vendors &	EFT	20136004813	299.00	299.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/3/2024	B-268567733	1586--Writenburg Door 1586--Writenburg Door	5880--Instructional Vendors & 5880--Instructional Vendors &	EFT EFT	20136004762 20136004762	7,150.36 7,150.36	1,237.61 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

5/28/2024	5/20/2024	B-268572911	v3104--Yamaha Music Academy of Fullerton	5880--Instructional Vendors &	EFT	101090	352.00	352.00	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
5/22/2024	5/7/2024	B-268569259	2255--Yamaha Music School Cerritos/Chino Hills	5880--Instructional Vendors &	EFT	101054	1,810.60	1,185.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	5/8/2024	B-268569346	2255--Yamaha Music School Cerritos/Chino Hills	5880--Instructional Vendors &	EFT	101054	1,810.60	289.60	In Transit	910--Instructional Funds	2053--Excel Academy Charter School - Warner
				5880--Instructional Vendors &	EFT	101054	1,810.60	336.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/3/2024	B-268567656	4101--Yvonne Dill Cruz	5880--Instructional Vendors &	EFT	100982	700.00	700.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
5/22/2024	5/2/2024	B-268567735	2309--Zak Barnett Studios	5880--Instructional Vendors &	EFT	100972	399.00	399.00	In Transit	910--Instructional Funds	2073--Excel Academy Charter School - Helendale
Total for CHASE 9313							860,129.31	860,129.31			



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# HATCH & CESARIO

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ATTORNEYS-AT-LAW

June 5, 2024

*Sent Via Email Only: (hgasca@excelacademy.education)*

Heidi Gasca, M. Ed., Chief Executive Officer  
Excel Academy Charter Schools  
1 Technology Drive, Ste. I-811  
Irvine, CA 92618

Re: 2024-2025 Legal Services Agreement

Dear Heidi:


Attached for your consideration is Hatch & Cesario's legal services agreement for the 2024-2025 fiscal year.

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

Thank you for choosing Hatch & Cesario. We appreciate the opportunity to work with Excel Academy Charter Schools.

Sincerely,

HATCH & CESARIO, Attorneys-at-Law

  
Deborah R.G. Cesario

Enclosures: 2024-2025 Legal Services Agreement  
Hatch & Cesario's W-9

cc: Kurt Madden, Board Consultant for Excel Academy Charter Schools

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

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# HATCH & CESARIO

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ATTORNEYS-AT-LAW

**AGREEMENT FOR LEGAL SERVICES**

**July 1, 2024 – June 30, 2025**

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

**Attorney’s Services**

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

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

**Hourly Rates**

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

Senior Partners/Senior Of-Counsel*	\$375.00
Partners/Of-Counsel	\$360.00
Senior Associate	\$330.00
Associate	\$315.00
Law Clerk	\$220.00
Senior Paralegal	\$220.00
Paralegal	\$210.00
Education Consultant	\$210.00

*\*With 25 years of experience or more and named partners.*

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

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

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

In-office Photocopying	\$0.25 per page
Outside Photocopying	Actual usage
Facsimile/Scanning	None
Postage	Actual usage
Mileage	IRS mileage rate

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

### **Payment for Services**

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

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

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

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

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

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

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

**Discharge of Services**

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

**Mediation**

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

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

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

**Term of Agreement**

The term of this Agreement is effective July 1, 2024 through June 30, 2025, and may be modified in writing by mutual agreement of Client and Attorney. This Agreement shall be terminable by either Attorney or Client upon thirty (30) days written notice.

Excel Academy Charter Schools

Hatch & Cesario, Attorneys-at-Law

\_\_\_\_\_  
Heidi Gasca, M. Ed.  
Chief Executive Officer

Deborah R.G. Cesario  
Deborah R.G. Cesario  
Senior Partner

\_\_\_\_\_  
Date

June 5, 2024  
\_\_\_\_\_  
Date

Form **W-9**  
 (Rev. March 2024)  
 Department of the Treasury  
 Internal Revenue Service

## Request for Taxpayer Identification Number and Certification

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

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

**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

<b>Print or type. See Specific Instructions on page 3.</b>	<b>1</b> Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)	
	<b>Law Offices of Deborah R.G. Cesario</b>	
	<b>2</b> Business name/disregarded entity name, if different from above.	
	<b>Doing business as Hatch &amp; Cesario, Attorneys-at-Law</b>	
	<b>3a</b> Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.	
	<input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input checked="" type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ <b>Note:</b> Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) _____	
	<b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):	
Exempt payee code (if any) _____		
Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____		
(Applies to accounts maintained outside the United States.)		
<b>3b</b> If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>		
<b>5</b> Address (number, street, and apt. or suite no.). See instructions.		
<b>10531 4S Commons Drive, Suite 583</b>		
<b>6</b> City, state, and ZIP code		
<b>San Diego, CA 92127</b>		
<b>7</b> 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. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

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

**Part II Certification**

Under penalties of perjury, I certify that:

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

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

<b>Sign Here</b>	Signature of U.S. person 	Date <b>April 22, 2024</b>
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**General Instructions**

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

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

**What's New**

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

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-NEC (nonemployee compensation).
- 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), and 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.

**Caution:** If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

**By signing the filled-out form**, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

**Note:** If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding.** Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

**Foreign person.** If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

**Nonresident alien who becomes a resident alien.** Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

**Example.** Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

## Backup Withholding

**What is backup withholding?** Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

**Payments you receive will be subject to backup withholding if:**

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under "*By signing the filled-out form*" above (for reportable interest and dividend accounts opened after 1983 only).



Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

## What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

## Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

## Penalties

**Failure to furnish TIN.** If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

**Civil penalty for false information with respect to withholding.** If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

**Criminal penalty for falsifying information.** Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

**Misuse of TINs.** If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

## Specific Instructions

### Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

- **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

**Note for ITIN applicant:** Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

- **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or “doing business as” (DBA) name on line 2.

- **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

- **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

- **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner’s name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

### Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

### Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

### Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

**Note:** A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

### Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

#### Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).



- 2—The United States or any of its agencies or instrumentalities.
- 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- 5—A corporation.
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
- 8—A real estate investment trust.
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
- 10—A common trust fund operated by a bank under section 584(a).
- 11—A financial institution as defined under section 581.
- 12—A middleman known in the investment community as a nominee or custodian.
- 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 <sup>1</sup>	Generally, exempt payees 1 through 5. <sup>2</sup>
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

<sup>1</sup> See Form 1099-MISC, Miscellaneous Information, and its instructions.

<sup>2</sup> However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

**Exemption from FATCA reporting code.** The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

- A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).
- B—The United States or any of its agencies or instrumentalities.
- C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).
- E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

- F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.
- G—A real estate investment trust.
- H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.
- I—A common trust fund as defined in section 584(a).
- J—A bank as defined in section 581.
- K—A broker.
- L—A trust exempt from tax under section 664 or described in section 4947(a)(1).
- M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

**Note:** You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

**Line 5**

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

**Line 6**

Enter your city, state, and ZIP code.

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

**Enter your TIN in the appropriate box.** If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

**Note:** See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

**How to get a TIN.** If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at [www.SSA.gov](http://www.SSA.gov). You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at [www.irs.gov/EIN](http://www.irs.gov/EIN). Go to [www.irs.gov/Forms](http://www.irs.gov/Forms) to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to [www.irs.gov/OrderForms](http://www.irs.gov/OrderForms) to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

**Note:** Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

**Caution:** A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

## Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

**Signature requirements.** Complete the certification as indicated in items 1 through 5 below.

**1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.** You must give your correct TIN, but you do not have to sign the certification.

**2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983.** You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

**3. Real estate transactions.** You must sign the certification. You may cross out item 2 of the certification.

**4. Other payments.** You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

**5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions.** You must give your correct TIN, but you do not have to sign the certification.

## What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account <sup>1</sup>
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor <sup>2</sup>
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee <sup>1</sup>
b. So-called trust account that is not a legal or valid trust under state law	The actual owner <sup>1</sup>
6. Sole proprietorship or disregarded entity owned by an individual	The owner <sup>3</sup>
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity <sup>4</sup>
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

<sup>1</sup> List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

<sup>2</sup> Circle the minor's name and furnish the minor's SSN.

<sup>3</sup> You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

<sup>4</sup> List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

\* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

\*\* For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

**Note:** If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

## Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

**Protect yourself from suspicious emails or phishing schemes.**

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to [phishing@irs.gov](mailto:phishing@irs.gov). You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at [spam@uce.gov](mailto:spam@uce.gov) or report them at [www.ftc.gov/complaint](http://www.ftc.gov/complaint). You can contact the FTC at [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft) or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see [www.IdentityTheft.gov](http://www.IdentityTheft.gov) and Pub. 5027.

Go to [www.irs.gov/IdentityTheft](http://www.irs.gov/IdentityTheft) to learn more about identity theft and how to reduce your risk.

## Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

## 2024 Budget Projections

### Excel Academy Charter Schools

Coverage	Effective Date	2023-2024 Annual Premiums	2024-2025 Budgeted Premiums	% Difference
Property <ul style="list-style-type: none"> <li>• <i>Building Personal Property</i></li> <li>• <i>Business Income &amp; Extra Expense</i></li> <li>• <i>Inland Marine</i></li> </ul>	7/1/2024	\$ 474	\$ 545	15%
Automobile	7/1/2024	\$ 3,936	\$ 4,330	10%
General Liability <ul style="list-style-type: none"> <li>• <i>Sexual Abuse &amp; Molestation</i></li> <li>• <i>Employee Benefits Liability</i></li> </ul>	7/1/2024	\$ 18,456	\$ 20,302	10%
Umbrella Liability	7/1/2024	\$ 7,710	\$ 8,481	10%
Educators Legal Liability <ul style="list-style-type: none"> <li>• <i>Directors &amp; Officers Liability</i></li> <li>• <i>Employment Practices Liability</i></li> </ul>	7/1/2024	\$ 26,927	\$ 30,966	15%
Crime	7/1/2024	\$ 4,018	\$ 4,219	5%
Cyber Liability	7/1/2024	\$ 12,067	\$ 13,877	15%
Student Accident – Base	7/1/2024	\$ 3,141	\$ 3,298	5%
Workers' Compensation	7/1/2024	\$ 50,948	\$ 53,495	5%
<b>TOTAL PROGRAM COST</b>		<b>\$ 127,677</b>	<b>\$ 139,513</b>	<b>9%</b>

**NOTE: Budget contains early valuations. Values may be amended with updated market data obtained after January 1, 2024.**

This summary provides general guidelines of factors, which influence rate changes and/or premium calculations. Carriers may take other factors into consideration and estimates are based on current knowledge of claims and general rate tendencies in the marketplace.



## 2024 Budget Projections

Coverage Description	Factors which Influence Rating
Property <ul style="list-style-type: none"> <li>• <i>Building Personal Property</i></li> <li>• <i>Business Income &amp; Extra Expense</i></li> <li>• <i>Inland Marine</i></li> </ul>	<ul style="list-style-type: none"> <li>• Additional Exposure (adding new locations, increasing coverage for buildings, business personal property, or business income)</li> <li>• Loss History</li> <li>• Property Values</li> <li>• Brush Areas; with recent fires this may be considered higher risk</li> </ul>
Automobile	<ul style="list-style-type: none"> <li>• Vehicle Count</li> <li>• Loss History</li> </ul>
General Liability <ul style="list-style-type: none"> <li>• <i>Sexual Abuse &amp; Molestation</i></li> <li>• <i>Employee Benefits Liability</i></li> </ul>	<ul style="list-style-type: none"> <li>• Increased/Additional Exposure</li> <li>• Square Footage of Locations/Student Count</li> <li>• Loss History</li> </ul>
Educators Legal Liability <ul style="list-style-type: none"> <li>• <i>Directors &amp; Officers Liability</i></li> <li>• <i>Employment Practices Liability</i></li> </ul>	<ul style="list-style-type: none"> <li>• Employee Count (Faculty Count)</li> <li>• Loss History</li> </ul>
Umbrella/Excess Liability	<ul style="list-style-type: none"> <li>• Exposure of underlying coverages (General Liability, Auto Liability, Employee Benefits Liability, Abuse/Molestation)</li> <li>• Loss History</li> </ul>
Cyber Liability	<ul style="list-style-type: none"> <li>• Student Count</li> <li>• Annual Revenue</li> <li>• Loss History</li> </ul>
Student/Volunteer Accident	<ul style="list-style-type: none"> <li>• Number of Students/Volunteers</li> <li>• Loss History</li> </ul>
Workers' Compensation	<ul style="list-style-type: none"> <li>• Class Code</li> <li>• Payroll</li> <li>• Employee Count</li> <li>• Loss History &amp; Experience Modification Factor</li> </ul>

# Coversheet

## Consent - Education Student/Services

**Section:** VII. Consent  
**Item:** B. Consent - Education Student/Services  
**Purpose:**  
**Submitted by:**  
**Related Material:** Care Solace - Excel Academy Renewal (w Social Services) 24-25.pdf  
Safety Plan 24-25.pdf  
Excel Academy 2024-2025 English Learner Master Plan.pdf

### BACKGROUND:

Item: Revised Comprehensive Injury, Illness and Safety Plan

Background: This item is the Excel Academy Charter School 2024-2025 Injury, Illness, Safety Plan. Changes to this document include annual updates to sections involving heat related injury as well as compliance to workplace violence. Additions to the manual include a new sub section outlining Excel Academy Charter School process to identify, limit, react and respond to workplace violence. The plan includes comprehensive instructions for staff members to remain safe while on site.

Item: Care Solace Services 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.

Item: English Learner Master Plan

Background: The English Learner (EL) Master Plan is a document that specifically explains Excel Academy Charter School's goals, vision, testing protocol, and reclassification process for English Learner (EL) students. Core instruction in language arts, math, science and social science is taught in English using charter approved curriculum and SDAIE methodology. EL students receive English Language Development (ELD) instruction which addresses the ELD standards in listening, speaking, reading and writing. EACS students will engage in synchronous and asynchronous instruction. There are no significant changes to the EL Master Plan for the 24-25 school year.



## AMENDMENT TO ADD SERVICES AND RENEW SERVICE AGREEMENT

This amendment to add Services and renew the Service Agreement (the “**Amendment**”) is effective as of the date of the last signature between Excel Academy a California charter school district (hereinafter “**School District**”), and Care Solace, Inc., a Delaware corporation (hereinafter “**Care Solace**”). School District and Care Solace may be referred to individually as “**Party**,” or collectively as “**Parties**.”

### RECITALS

**WHEREAS**, School District and Care Solace have entered into a Service Agreement dated November 10, 2022, with a current term from July 1, 2023, through June 30, 2024 (the “**Service Agreement**”); and

**WHEREAS**, the Parties agree that they wish to add additional Services to the Service Agreement and renew the Service Agreement for a term beginning on July 1, 2024 and continuing through June 30, 2025 (the “**Renewal Term**”); and

**WHEREAS**, the Parties agree that it is their mutual intention by execution of this Amendment that the Service Agreement and any addenda or amendments thereto shall be amended and renewed in full for the Renewal Term, subject to the revisions expressly set forth herein, and that the Service Agreement and any addenda or amendments, as modified by this Amendment, shall be binding upon the Parties.

**NOW, THEREFORE**, in consideration of the matters described above and of the mutual benefits and obligations set forth in the Service Agreement and any addenda or amendments thereto, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

#### A. Additional Service Agreement Terms

The Parties hereby agree that the below referenced additional terms shall be incorporated into the Service Agreement and shall be binding upon the Parties as of July 1, 2024:

1.5 Social Services Care Coordination: Care Solace will provide the following care coordination services for referrals to community-based social services:

1.5.1 Care Solace shall facilitate a screening and referral process for social services whereby School District staff provide Care Solace with contact information of a student in need of social services such as free or reduced-cost dental care, medical services, housing, food, etc., available through community providers/organizations (hereinafter, the “**Community-Based Social Services**”).

1.5.2 Care Solace shall also provide students' families in need of social services with telephone and email access to a social services coordinator. The social services coordinators are experienced in customer service and are trained to navigate the social services system and community-based resources. The social services coordinators are not licensed mental health or social services professionals and do not diagnose, assess or evaluate. No professional, fiduciary, or other special legal relationship is formed by a social services coordinator's recommendation of social services to an Authorized User. The social services coordinators are not a crisis response team. The social services coordinators are

available to work directly with students' families to connect them with Community-

Based Social Services. Social services coordinators are available 24 hours per day, 7 days per week.

1.5.3 Care Solace connects Authorized Users with Community-Based Social Services based on criteria that may include but not be limited to geographic proximity, socio-economic status, whether the social services provider provides services on a reduced-cost or cost-free basis, and, in the case of housing/shelter, whether the social services provider provides services to persons of specific ages and/or genders. Care Solace will use reasonable efforts to confirm that each social service provider it refers to Authorized Users is an appropriate fit for each Authorized User's individual needs. The information available on social services providers through the verification process may vary significantly.

11.3 The Renewal Term of this Agreement will begin on July 1, 2024, and continue through June 30, 2025. This Agreement will then renew automatically for one-year terms (hereinafter, “**Renewal Term**”) on July 1st of each year (hereinafter the “**Renewal Date**”) unless either Party provides the other Party with at least sixty (60) days prior written notice, as set forth herein, to terminate this Agreement effective at the end of the existing Renewal Term. The maximum term of this Agreement is five (5) years.

For each Renewal Term, School District will pay \$8,300 to Care Solace on or around the Renewal Date for that Renewal Term.

### **B. Modification of Service Agreement Terms**

The Parties hereby agree that the below referenced provision shall be replaced in the Service Agreement and shall be binding upon the Parties:

First Recital. The definition of “**Services**” is hereby amended to be “locating and connecting with mental health treatment providers and community-based social services”.

Section 54, Notices: The Notice contact information for Care Solace is hereby deleted and replaced by the following:

If to Care Solace:

Care Solace, Inc.

120 Birmingham Drive, Suite 200

Cardiff, CA 92007

Attention: Chad Castruita

Email: chad.castruita@caresolace.org

### **C. Incorporation of Service Agreement Terms and Conditions**

Other than the Additions and Modifications set forth in Sections A and B above, the Service Agreement and any addenda or amendments thereto are incorporated here by this reference as though fully set forth herein and the Parties agree that all of the Terms and Conditions of the Service Agreement are in effect during the Renewal Term.

**SIGNATURES ON NEXT PAGE – REMAINDER OF PAGE INTENTIONALLY BLANK**

**IN WITNESS WHEREOF** the Parties hereto have executed this Amendment as of the date of the last signature below.

**Care Solace, Inc. (“Care Solace”)**

Printed Full Name: Anita Ward

Title: Chief Growth Officer

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

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

**Excel Academy ("School District")**

Printed Full Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

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



# COMPREHENSIVE INJURY, ILLNESS, AND SAFETY PLAN

2024 - 2025

Executive Director:

**Heidi Gasca**

Board of Directors

**William Hall, Board President**

**Michael Humphrey, Board Vice President**

**Steve Fraire, Board Clerk**

**Susan Houle, Board Member**

**Larry Alvarado, Board Member**



949-387-7822



[excelacademy.education](https://www.excelacademy.education)

## **EVALUATION OF PROGRESS AND REVISION OF COMPREHENSIVE SAFETY PLAN**

Part 1 and 2 Comprehensive Safety Plan Draft 0119

The Comprehensive School Safety Plan (Plan) is established to ensure the health and safety of pupils and staff. The Plan shall be evaluated and amended, as needed, by the Board of Directors no less than once a year to ensure that the Plan is properly implemented. (Education Code Section 35294.2[e]47605(F)(i)-(ii)). The Plan will be reviewed and updated by March 1 of each year.

The Plan is in compliance with Education Code Sections 44237(A) and (H), inclusive of paragraph (2) of subdivision (a) of Section 32282. An updated file of all safety-related plans and materials shall be readily available for inspection by the public. A copy of the Plan will be kept in each school office.

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## Section I: Program Plan Purpose

### Purpose

The purpose of this Plan is to provide specific guidelines and procedures for Teachers, Administration, Staff, Parents, Students, and Providers. It is the school's goal that readers will be prepared to respond to the variety of emergency situations that could arise in or around school functions and events.

### Objective

Excel Academy recognizes that students and staff have the right to a safe, secure, and respectful environment where they are free from physical and psychological harm. The school is fully committed to maximizing school safety and to creating a positive learning environment that includes strategies for violence prevention and high expectations for student and employee conduct.

### Nondiscrimination and Fair Treatment of Pupils

Excel Academy realizes that a major source of conflict in many schools is the problem of bias and unfair treatment of students based on actual or perceived ancestry, age, color, disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sex, sexual orientation, or association with a person or a group with one or more of these actual or perceived characteristics. Our school strives to convey the attitude that all children can achieve academically and behave appropriately, while at the same time appreciating individual differences. Excel Academy strives to communicate to students and the greater community that all students are valued and respected.

### Conduct

Excel Academy believes that all students have the right to be educated in a positive learning environment free from disruptions. At program activities, students shall be expected to exhibit appropriate conduct that does not infringe upon the rights of others or interfere with the event.

Behavior is considered appropriate when students are diligent in study, responsible with program property, courteous and respectful towards teachers, staff, volunteers, and other students. Every effort is made to ensure students are aware of the expected behaviors at a program-organized event.

The Executive Director or designee shall ensure that each program develops standards of conduct and discipline consistent with board policies and administrative regulations.

Parents/guardians and students may be provided information about early warning signs of harassing/intimidating behaviors, such as bullying, as well as prevention and intervention strategies.

## Plan Elements

The Excel Academy School Plan contains the following elements:

- Emergency Preparedness
  - Professional Development/Staff Meetings
  - Learning Period Meetings
  - Testing site safety and contact procedures
  - Field trip safety and contact procedures
  - Professional Development/Staff Meetings
  - School office evacuation procedures
- Human Resources
  - Mandated Reporter
  - Sexual Harassment
  - Bloodborne Pathogens
  - Active Shooter
- Expectations of Conduct
  - Students
  - Parents/Guardians
  - Staff

The school Plan shall be evaluated annually and re-published in March of each year. A copy of the School Plan will be available for review at the Excel Academy school office and online at [www.excelacademy.education](http://www.excelacademy.education).

## Criminal Background Check

All candidates for employment shall submit to a criminal background check in compliance with Education Code Section 44237 prior to employment. Criminal background checks cannot be carried over from the candidate's prior employer. Failure to submit to a criminal background check will result in the candidate's application for that position being withdrawn from further consideration.

## Section II: Program Policies

### A. Child Abuse Reporting

In compliance with EC Section 32282, this section will identify the proper Child Abuse reporting procedures consistent with Article 2.5 (commencing with Section 11164) of Chapter 2 of Title 1 of Part 4 of the Penal Code.

#### Duty to Report

In conformance with the requirements of Penal Code 11165.7, any district employee who has knowledge of or observes a child in their professional capacity or within the scope of their employment, whom they know or reasonably suspects has been a victim of child abuse, shall report the known or suspected instance of child abuse to the Sheriff and/or child protective agency immediately or as soon as practically possible by telephone, and shall prepare and send a written report thereof within 36 hours of receiving the information concerning the incident. The mandated reporting duties are required of the individual and cannot be delegated to another individual except under circumstances set forth in Penal Code 11166.

For the purposes of this reporting procedure and the Penal Code 11166.1, "reasonable suspicion" means that it is objectively reasonable for a person to entertain such a suspicion, based upon facts that could cause a reasonable person in a like situation, drawing when appropriate on their training and experience, to suspect child abuse.

#### Definitions:

1. "Child Abuse" includes the following:
  - a. A physical injury inflicted by other than accidental means on a child by another person
  - b. Sexual abuse of a child
  - c. Willful cruelty or unjustifiable punishment of a child, or willfully inflicting unjustifiable physical pain or mental suffering, or failure to safeguard a child from these injuries when the child is under a person's care or custody
  - d. Unlawful corporal punishment or injury resulting in a traumatic condition
  - e. Neglect of a child or abuse in out-of-home care
2. "Mandated Reporters" are those people defined by law as "child care custodians," "health practitioners," "child visitation monitors," and "employees of a child protective agency." Mandated reporters include virtually all Excel Academy employees. The following Excel Academy personnel are required to report:
  - a. Teachers, administrators, supervisors of child welfare and attendance, certificated pupil personnel employees, and those instructional aides or other classified employees trained in child abuse reporting

3. "Child Protective Agencies" are those law enforcement and child protective services responsible for investigating child abuse reports, including the local police or sheriff department, county welfare or juvenile probation
4. Employees reporting child abuse to a child protective agency are encouraged, but not required, to notify the Executive Director, or the director's designee as soon as possible after the initial verbal report by telephone.

The Executive Director so notified shall provide the mandated reporter with any assistance necessary to ensure that reporting procedures are carried out in accordance with California State law and regulations. At the mandated reporter's request, the Executive Director may assist in completing and filing these forms.

If the mandated reporter does not disclose their identity to the Executive Director, they shall provide or mail a copy of the written report to the main office without their signature or name.

#### Legal Responsibility and Liability:

1. Mandated reporters have absolute immunity. Excel Academy employees required to report are not civilly or criminally liable for filing a required or authorized report of known or suspected child abuse.
2. If a mandated reporter fails to report an instance of child abuse, which they know to exist or reasonably know to exist, they are guilty of a misdemeanor punishable by confinement in jail for up to six months, a fine of up to \$1,000, or both. The mandated reporter may also be held civilly liable for damages resulting from any injury to the child after a failure to report.
3. When two or more persons who are required to report have joint knowledge of a suspected instance of child abuse, and when they so agree, the telephone report may be made by either of them, and a single report made and signed by that person. However, if any person who knows that the designated person failed to make the report, that person then has a duty to do so.

#### Child Protective Services Hotlines

1. Orange county: 714-940-1000 -or- 800-207-4464
2. Los Angeles county: 800-540-4000 (within CA), 213-639-4500 (outside CA), 800-272-6699 TDD
3. Riverside county: 800-442-4918 -or- 877-922-4453
4. Ventura county: 805-654-3200
5. Kern county: 661-631-6011 -or- 760-375-6049
6. San Bernardino county: 909-384-9233 -or- 800-827-8724
7. San Diego county: 858-560-2191 -or- 800-344-6000
8. Imperial county: 760-337-7750

#### Sheriff's Offices Contact Information

1. Orange county
  - o Phone: 714-647-7000



- o Website: <http://www.ocsd.org>
- 2. Los Angeles county
  - o Phone: 323-267-4800
  - o Website: <http://www.lasd.org>
- 3. Riverside county
  - o Phone: 951-955-2400
  - o Website: <http://www.riversidesheriff.org>
- 4. Kern county
  - o Phone: 661-391-7500
  - o Website: <http://www.kernsheriff.com>
- 5. Ventura county
  - o Phone: 805-654-9511
  - o Website: <http://www.vcsd.org>
- 6. San Bernardino county
  - o Phone: 909-387-3400
  - o Website: <http://www.sbcounty.gov/sheriff>
- 7. San Diego county
  - o Phone: 858-974-2240
  - o Website: <http://www.sdsheriff.net>
- 8. Imperial county
  - o Phone: 442-265-2001
  - o Website: <http://www.icsso.org>

Within 36 hours, a written report must be sent, faxed or submitted electronically. The written report must be completed on a state form called 8572, which will be downloaded at

[http://ag.ca.gov/childabuse/pdf/ss\\_8572.pdf](http://ag.ca.gov/childabuse/pdf/ss_8572.pdf). ([Appendix C: Child Abuse Report Form](#))

#### Child Abuse Training Requirement:

- Per AB 1432, all Excel Academy employees must annually complete the Mandated Reporter Training course within the first six weeks of school or by the sixth week of employment.
- This course is fully compliant with California Assembly Bill 1432 and is available online through SafeSchools, the school's online training and tracking system designed specifically for education agency employees.
- The SafeSchools learning management system will generate the required reports for proof of completion. Employees must retain a copy of the training certificate.
- Staff must access online training courses at:
  - o <http://www.mandatedreporterca.com/> -or-
  - o <https://eacs-ca.safeschools.com/login>
    - Mandated reporter training courses will be assigned through the SafeSchools interface.

## B. Routine & Emergency Disaster Procedures

Excel Academy is an independent study program where students are schooled in the home and through independent providers in the community. Typically, students are under the direct supervision of their parent/guardian. However, there are instances when Excel Academy sponsors events such as field trips and state testing, when it is important to have a clear emergency preparedness plan.

In such instances, it is necessary to be prepared to respond to a vast array of emergency situations. The program's procedures for evacuation and emergency preparedness are outlined in the following section for testing sites, the school office, staff meetings, and field trips. The roles of the responsible parties, training, and resources necessary to perform those responsibilities, are defined for each site where school operations are conducted.

Furthermore, it is important to clearly define the responsibilities of the school and parent/guardian in the event of an emergency or disaster. It is also necessary to define the school's dismissal procedures in the event of a key policy violation or violations.

### Required Training and Resources for All Employees

- Active Shooter
- Workplace Violence
- Complete Safe Schools Training - First Aid
- Emergency Apps downloaded on phone
  - Red Cross First Aid
- Maintain current personal emergency contact information with Excel Academy in Paycom
- Report safety concerns to Executive Director immediately
- Support Executive Director as needed
- Follow the emergency plans as directed by the venue

### Professional Development/Staff Meetings

Biannual staff meetings are conducted.

## Guidelines for Student and Staff Dismissal

### Student Dismissal

#### Is this for Field Trips?

In the event that a state of emergency is declared that does not pose an immediate threat to the school, all students will be required to remain onsite, or at an alternate location, designated by law enforcement under the supervision of the Executive Director, director's designee, or other school staff assigned by the Executive Director or designee. Students not already attended by a parent/guardian will not be permitted to leave until:

1. Regular dismissal time, and only if it is considered safe to do so.
2. An authorized adult with a photo ID, who is identified as the designated pick-up, arrives to retrieve the student.
3. In the event of a natural or man-made disaster that prevents parents and other designated adults from picking up students, students will remain under the supervision of school staff.

### Staff Dismissal

In the event that a state of emergency is declared that does not pose an immediate threat to students all school employees will remain on site and carry out their assignments until officially dismissed by the Executive Director or director's designee, or relieved by fire or law enforcement.

### Executive Director Responsibilities

The Executive Director of Excel Academy is responsible for overall policy, direction and coordination of the emergency response effort during the incident. The Executive Director is also responsible for interacting with responding state/government agencies. The Executive Director will:

- Ensure that all staff are trained in the use of the safety plan.
- Direct the school's personnel during a disaster including:
  - Teacher of Records, Administrative Staff, Support Staff, Providers
- Serve as the spokesperson for the program to the media after a disaster.
- Direct all staff to become familiar with the implementation of the plan.

### Responsibilities

- Assess emergency, threat and impact to students, staff, school property and surrounding community; The Executive Director will contact the Sheriff's Department and Highway Patrol to determine whether an evacuation of students and staff from a school is advised.
- Authorize any release of public information.
- Release Teacher of Records and Providers as appropriate.

- Remain in charge of the program until redirected or released by the CEO of the school or relieved by the Fire or Law Enforcement Incident Commander.
- Designate a person who will assist in a disaster situation in their absence.
- Work in coordination with the Red Cross if the school is designated an evacuation center.
- The Executive Director or their designee will monitor the emergency communication system and immediately notify the CEO in the event of a chemical spill on the roads or railway system within the vicinity.

## Fire

### Building Fire

- Evacuate the building as soon as possible. The safety of all persons and students must take precedence over personal effects.
- Call 911
- Contact the Executive Director or designee
- Do not re-enter the building until directed by law enforcement and/or fire department personnel.

### Student Catching Fire

- Instruct student to **Stop, Drop** and **Roll**, if their clothing catches on fire (Never instruct a student to run when clothes are on fire) and will use a blanket, jacket or other available material - Starting at the head of the victim, drag the blanket toward the feet, moving the flame away from the face
- Contact the Executive Director or designee

### Testing Site

If an employee is at a testing site the Assessment Lead or senior Excel Academy employee will:

1. Begin orderly evacuation immediately
2. Lead students to the designated evacuation area away from fire lanes
3. Take roll once in the evacuation area
4. Report any missing students to the Assessment Lead or senior Excel Academy employee immediately
5. Remain with students until given alternative instructions

## Relocation/Evacuation

### Relocation/Evacuation from the School Office

In the event that an emergency occurs, all employees are to evacuate the building by following the procedures below. For an evacuation map, please see Appendix *F*.

1. All employees must immediately stop whatever they are doing and quickly and safely exit the building, if possible.
2. It is the responsibility of the most senior staff member present at the time of the emergency to see that all employees leave the building promptly and safely.

3. All employees must exit the building by way of the nearest exit or stairwell to the outside.
  1. If the nearest stairwell is blocked by smoke, use the other stairwell. DO NOT USE THE ELEVATOR. Excel Academy will make every attempt to create prior arrangements with staff and individuals with disabilities as needed to assist them in the event of an evacuation.
  2. If the nearest doorway or exit is blocked, and if the emergency calls for immediate evacuation, utilize the window breaker to clear a safe path to the outside.
1. Follow the exit plans and get to the secure designated meeting area.
2. Once outside the building, the designee will:
  1. Confirm that the fire department has been called (911)
  2. All employees must immediately congregate in the designated meeting area and the senior employee will confirm that all employees and visitors are out of the building and accounted for.
  3. Designate someone to meet the fire department to provide additional information if necessary.
1. Staff members will be assessed to determine if additional medical attention is required and appropriate action will be taken.
2. Do not re-enter until the building is declared safe by the Fire Department and you are informed to do so by the Executive Director or designee.

#### Relocation/Evacuation from a public meeting space or business

1. Follow the evacuation procedure posted at the meeting space or business location.
2. Follow staff member instructions.
3. Excel Academy employees, supervise the evacuation of students and parents
4. Ensure that all parents and/or students are accounted for.
5. Contact 911 as soon as it is safe to do so.
6. Contact a school administrator to inform them of the situation.

### Bomb Threat

Excel Academy Administrative staff or teachers may be notified of bomb threats via different mediums, e.g., telephonic, written, email, etc. In the event of a bomb threat, the administration will assess the location of the bomb threat and how many TORs, staff and students may be in or near the area of the threat.

If Administration, TORs, or support staff are the person(s) receiving the message of a bomb threat by phone they must try to maintain contact with the caller and ask for the location of the bomb, the time it is expected to detonate, the reason for the bomb, etc. In the event that a staff member or TOR receives a bomb threat, they must immediately notify:

- The Executive Director
- The Sheriff's Department
- The Fire Department

## Bioterrorism/Hazardous Materials/Chemical Accident

Biological agents are organisms or toxins that can kill or incapacitate people. A biological attack is the deliberate release of germs or other biological substances that can make you sick.

There are three basic groups of biological agents that could likely be used as weapons: bacteria, viruses, and toxins. Biological agents can be dispersed by spraying them into the air, person-to-person contact, infecting animals that carry the disease to humans, and by contaminating food and water.

A biological attack may or may not be immediately obvious. In most cases local health care workers will report a pattern of unusual illness or there will be a wave of sick people seeking emergency medical attention. The public would be alerted through an emergency radio or TV broadcast, or some other signal used in your community, such as a telephone call or a home visit from an emergency response worker.

### During a Biological Threat

The first evidence of an attack may be when you notice symptoms of the disease caused by exposure to an agent. In the event of a biological attack, public health officials may not immediately be able to provide information on what you must do. It will take time to determine exactly what the illness is, how it must be treated, and who is in danger.

Follow these guidelines during a biological threat:

- Watch TV, listen to the radio, or check the Internet for official news and information including signs and symptoms of the disease, areas in danger, if medications or vaccinations are being distributed, and where you must seek medical attention if you become ill.
- If you become aware of an unusual and suspicious substance, quickly get away.
- Cover your mouth and nose with layers of fabric that can filter the air but still allow breathing.
- Depending on the situation, wear a face mask to reduce inhaling or spreading germs.
- If you have been exposed to a biological agent, Follow official instructions for disposal of contaminated items.
- Wash yourself with soap and water and put on clean clothes.
- Contact authorities and seek medical assistance.
- You may be advised to stay away from others or even quarantined.
- If your symptoms match those described and you are in the group considered at risk, immediately seek emergency medical attention.



- Follow instructions of doctors and other public health officials, expect to receive medical evaluation if necessary
- In a declared biological emergency or developing epidemic avoid crowds
- Wash your hands with soap and water frequently.
- Do not share food or utensils.

### After a Biological Threat

Pay close attention to all official warnings and instructions on how to proceed. The delivery of medical services for a biological event may be handled differently to respond to increased demand.

The basic public health procedures and medical protocols for handling exposure to biological agents are the same as for any infectious disease. It is important for you to pay attention to official instructions via radio, television, and emergency alert systems.

Visit the **Centers for Disease Control and Prevention** for a complete list of potential agents/diseases and appropriate treatments.

### Chemical Emergencies

Chemical agents are poisonous vapors, aerosols, liquids and solids that have toxic effects on people, animals or plants. While potentially lethal, chemical agents are difficult to deliver in lethal concentrations because they dissipate rapidly outdoors and are difficult to produce.

### Before a Chemical Emergency

A chemical attack could come without warning. Signs of a chemical release include people having difficulty breathing, eye irritation, loss of coordination, nausea, or burning in the nose, throat and lungs. The presence of many dead insects or birds may indicate a chemical agent release.

### During a Chemical Emergency

In the event that Excel Academy employees find themselves located within one mile of where an accident involving containing large quantities of toxic (or unknown) agents has occurred, follow the below procedures:

- Take immediate action to get yourself and students/parents away.
- Get out of the building without passing through the contaminated area, if possible.
- If you can't get out of the building or find clean air without passing through the affected area, move as far away as possible and **shelter-in-place**.
- Contact 911 as soon as it is safe to do so.

- Contact a school administrator to inform them of the situation.

If you are instructed to remain in your home or office building, you must:

- Close doors and windows and turn off all ventilation, including furnaces, air conditioners, vents, and fans.
- Seek shelter in an internal room with your disaster supplies kit.
- Seal the room with duct tape and plastic sheeting.
- Look for further information from the local authority.

If you are caught in or near a contaminated area outdoors:

- Quickly decide what is the fastest way to find clean air:
  - Move away immediately, in a direction upwind of the source.
  - Find the closest building to **shelter-in-place**.

### After a Chemical Emergency

Do not leave the safety of a shelter to go outdoors to help others until authorities announce it is safe to do so.

A person affected by a chemical agent requires immediate medical attention from a professional. If medical help is not immediately available, decontaminate yourself and assist in decontaminating others.

Decontamination guidelines are as follows:

- Use extreme caution when helping others who have been exposed to chemical agents.
- Remove all clothing and other items in contact with the body.
  - Cut off clothing normally removed over the head to avoid contact with the eyes, nose and mouth.
  - Put contaminated clothing and items into a plastic bag and seal it.
  - Remove eyeglasses or contact lenses. Put glasses in a pan of household bleach to decontaminate them and then rinse and dry.
- Wash hands with soap and water.
- Flush eyes with water.
- Gently wash face and hair with soap and water before thoroughly rinsing with water.
- Proceed to a medical facility for screening and professional treatment.

This information is primarily drawn from Ready.gov. For more information on preparing for a power outage, please visit: <https://www.ready.gov/bioterrorism> or <https://www.ready.gov/chemical>.

## Earthquake

### Earthquake Procedures Indoors

In the event that an earthquake occurs in a location where a TOR, parent and student may be meeting inside, the following actions shall be taken:

1. School employees shall implement the Drop, Cover, and Hold action. Each student shall:
  - a. **Drop** to the ground. For those students who are physically unable to drop to the ground, they must remain seated and cover their heads with their arms and hands
  - b. **Cover** under or near desks, tables, or chairs in a kneeling position with their backs to the windows
  - c. **Hold** onto table or chair legs
  - d. Remain in the drop position until ground movement ends.
2. Assess the situation, looking for:
  - a. Severe structural damage
  - b. Fire
  - c. Toxic spill
  - d. Student injuries. (Render first aid if necessary)
3. Evacuate the building as soon as possible
4. Follow all instructions from law enforcement

If at a testing site:

1. Remain in drop position until ground movement ends
2. Assessment Lead or designee will direct employees to evacuate
3. Proctors will take proctor binders (containing student information)
4. Proctors will lead students to the designated evacuation area
5. Proctors will take roll once in the evacuation area
6. Any missing students will be immediately reported to the Assessment Lead or designee
7. Remain with students until given alternative instructions

### Earthquake Procedures Outdoors

In the event that an earthquake occurs in a location where employee(s), parent(s) and student(s) may be meeting outside, the following actions shall be taken:

1. Move away from overhead hazards such as power lines, trees, and buildings.
2. Drop to the ground in the kneeling position and cover the back of your neck with your hands.
3. Do not enter any buildings until it is safe to do so.
4. Teachers and students shall stay in the open until the earthquake is over, or until further directions are given.
5. Once the earthquake has stopped, proceed to the evacuation assembly area designated by the building manager or law enforcement.

6. The teacher will check roll, report any missing students, and remain with the students unless given an alternative assignment.
7. Follow all instructions from law enforcement

## Flood

Flash floods are to be expected in desert regions. In the event that flooding is likely, the Executive Director will instruct the Teacher of Records to cancel meetings that day. In preparation for flooding, families and staff must review the following safety tips.

### Basic Safety Tips (source: Ready.gov)

1. Avoid walking or driving through flood waters.
2. Do not drive over bridges that are over fast-moving floodwaters. Floodwaters can scour foundation material from around the footings and make the bridge unstable.
3. Just 6 inches of moving water can knock you down, and one foot of moving water can sweep your vehicle away.
4. If there is a chance of flash flooding, move immediately to higher ground.
5. If floodwaters rise around your car but the water is not moving, abandon the car and move to higher ground. Do not leave the car and enter moving water.

### Flood Watch = Be Aware

Conditions are right for flooding to occur in your area.

1. Turn on your TV/radio. You will receive the latest weather updates and emergency instructions.
2. Know where to go. You may need to reach higher ground quickly and on foot.
3. Build or restock your emergency preparedness kit. Include a flashlight, batteries, cash, and first aid supplies.

### Flood Warning = Take Action

Flooding is either happening or will happen shortly.

1. Move immediately to higher ground or stay on high ground.
2. Evacuate if directed.
3. Avoid walking or driving through flood waters. Just 6 inches of moving water can knock you down and one foot of moving water can sweep your vehicle away.

### After a Flood

1. Return to your home/office only when authorities say it is safe.
2. Be aware of areas where flood waters have receded and watch out for debris. Floodwaters often erode roads and walkways.
3. Do not attempt to drive through areas that are still flooded.
4. Avoid standing water as it may be electrically charged from underground or downed power lines.

## Power Failure/Blackout

Extended power outages may impact the whole community and the economy. A power outage is when the electrical power goes out unexpectedly. A power outage may:

1. Disrupt communications, water, and transportation.
2. Close retail businesses, grocery stores, gas stations, ATMs, banks, and other services.
3. Cause food spoilage and water contamination.
4. Prevent use of medical devices.

### In Preparation for a Power Outage:

1. Take an inventory of the items you need that rely on electricity.
2. Plan for batteries and other alternatives to meet your needs when the power goes out.
3. Sign up for local alerts and warning systems. Monitor weather reports.
4. Keep mobile phones and other electric equipment charged and gas tanks full.

### During a Power Outage:

1. Maintain food supplies that do not require refrigeration.
2. Turn off or disconnect appliances, equipment, or electronics. Power may return with momentary “surges” or “spikes” that can cause damage.

### Be Safe AFTER

1. When in doubt, throw it out! Throw away any food that has been exposed to temperatures 40 degrees or higher for two hours or more, or that has an unusual odor, color, or texture.

This information is primarily drawn from Ready.gov. For more information on preparing for a power outage, please visit: <https://www.ready.gov/power-outages>

## Intruders/Solicitors/Weapons/Assault/Hostage

### School Director and Human Resources

1. Maintain current staff emergency contact information in HR/Payroll System

2. Develop site emergency plans and protocol as well as communicate plans to staff
3. If facilities owned by Excel Academy, clearly post a site map indicating various evacuation routes and exits within the facility, fire extinguishers, location of the site alarm, and predesignated refuge or safe areas outside
4. Provide a first aid kit including flashlights and a window breaker
5. Provide safety training as needed

#### Designee

1. The most senior staff member present at the time of the emergency
2. Uphold the evacuation and Plan
3. Bring first aid kit

#### All Additional Office Staff

1. Maintain a current personal emergency contact with Excel Academy in Paycom
2. Responsible for following the emergency and Plan during an incident

#### If at a testing site, public meeting place, or vendor location:

##### Executive Director or director's designee

1. Maintain a current list of all employees in attendance
2. Responsible for supporting the venue's direction and coordination of emergency response effort during an incident
3. Obtain Site Emergency Plans, if possible
4. Obtain Site Emergency Evacuation Map, if possible
5. Establish an evacuation area and exits and clearly mark these on the site map
6. Ensure first aid kits are available

The intention of this policy is to provide guidance in the event of an armed/ violent intruder or active shooter in the workplace or onsite, to outline the training in place for staff and to comply with applicable regulations of the Occupational Safety and Health Administration (OSHA).

Excel Academy provides the staff with active shooter training via SafeSchools. All staff that serve at a school sponsored event or at the school office are required to complete the recorded training and quiz.

For the purposes of this policy, an active shooter is defined as a person or persons who appear to be actively engaged in killing or attempting to kill people at a school sponsored event or premises. In most cases active shooters use other weapons and/or improvised explosive devices to cause harm to additional victims and act as an impediment to police and emergency responders. These improvised explosive devices may detonate immediately, have a delayed detonation fuse, or detonate on contact.

All threats or perceived threats of violence against any person or property are considered serious. Staff who are alerted to or observe any threat or perceived threat shall immediately report the threat or perceived threat to law enforcement. The School



will support the local law enforcement in the immediate investigation and threat assessment, as needed. The very act of a threat shall be cause for discipline against a student or staff member and immediate removal of a visitor.

If an armed assault occurs on or near a public meeting place, testing site, or vendor location, program personnel who observed the assault must notify the assessment lead and call 9-1-1 as soon as safely possible.

Potential responses: In response to an active shooter event, there will be four potential courses of action:

evacuate, lockdown, hiding, or self-defense. The following guidelines identify these courses of action.

1. Initiate the appropriate response actions, which may include Shelter-in-Place, Lockdown, On-Campus Evacuation or Off-Campus Evacuation
2. Call 9-1-1 and provide the exact location, description and nature of the incident. If the TSC cannot remain on the phone, a designated person must remain on the phone line with the 9-1-1 dispatcher until law enforcement personnel arrive on the scene.

If it is safe to do so, proctors must attempt to isolate and secure the students away from the perpetrator(s). Notify the Executive Director or designee.

#### School employees or test site proctors will:

1. Take steps to calm and control students
2. Keep students in secured areas until local authorities arrive and are able to neutralize the perpetrator(s)
3. Stay inside testing rooms
4. Instruct students to lie flat on the floor, move away from the doors or windows and remain quiet
5. Turn off lights, lock doors and close any shades or blinds
6. The goal is to hide and make your room look vacant
7. Silence cell phones
8. Remain in the testing room, or secured area, until further instructions are provided by the AL or law enforcement

#### Procedure (All Locations):

1. Evacuate- If there is an accessible escape path, attempt to evacuate the premises following these recommendations:
  - a. Have an escape route and plan in mind
  - b. Evacuate regardless of whether others agree to follow
  - c. Leave belongings behind
  - d. Help others escape, if possible
  - e. Prevent individuals from entering an area where the active shooter may be
  - f. Keep hands visible

- g. Follow the instructions given by any law enforcement
  - h. Do not attempt to move wounded people
  - i. Call 911 when safe. Provide the following to the 911 dispatcher:
    - i. Description of the suspect
    - ii. Number and types of weapons
    - iii. Suspect's direction of travel
    - iv. Location and condition of victims
2. Hide- If evacuation is not possible, find a place to hide where the active shooter is less likely to find oneself with these recommendations:
- a. Be inconspicuous
  - b. Be outside of the active shooter's field of view
  - c. Provide physical protection if shots are fired (e.g. locating into a bathroom and locking the door, staying as low to the floor as possible and remaining quiet and motionless)
  - d. Do not trap oneself or restrict options for movement
  - e. To prevent an active shooter from entering a hiding place:
    - i. Lock the door
    - ii. Blockade the door with heavy furniture (use caution and not restrict options for movement if possible)
  - f. If the active shooter is nearby:
    - i. Lock the door
    - ii. Silence cell phones
    - iii. Turn off any source of noise (i.e. radios, televisions, etc.)
    - iv. Hide behind large items (i.e. cabinets, desks, etc.)
    - v. Remain quiet and motionless
3. Self Defense- If it is not possible to evacuate or hide, then consider self-defense with these recommendations:
- a. Remain calm
  - b. Dial 911 to alert police to the active shooter's location; if unable to speak, leave the line open and allow the 911 dispatcher to listen
  - c. Take action against the active shooter **only** when it is believed one's life is in imminent danger; attempt to disrupt and/or incapacitate the active shooter as follows:
    - i. Act as aggressively as possible toward the active shooter
    - ii. Throw items and improvised weapons
    - iii. Yell
    - iv. Commit oneself to defensive physical action

### Lockdown Sample Situations

1. The school has been informed that a crime has been committed near the school and the criminal has not been apprehended. There is no specific reason to believe that the criminal will come to the school.
2. The Sheriff's Department has informed the school that an armed and dangerous person is in the vicinity of the school and all precautions must be taken.

3. The school has received a direct credible threat that someone intends to do harm to one or more persons at the school.
4. Information has been received by the school that a non-custodial parent is coming to try to take a student away from the test site
5. A person not having legitimate business has been seen loitering in the vicinity of the school, please first try and relocate to a safer location and contact authorities. Try to avoid contact with the individual.

## Testing Site Lockdown

The decision to call for a *Lockdown* will be made by the designee responsible for the site or the TOR.

### The assigned designee shall:

1. Notify all other staff of the need for a campus lockdown, as soon as the decision has been made
2. As soon as possible after an emergency:
  - a. Inform the staff of the reasons for the lockdown
  - b. Contact Executive Director or designee
  - c. Parents and other community members who ask for the reason for the lockdown, either in person or by phone, will be given the reason as specifically as possible under the circumstances.
  - d. Not provide the names of any students or parents involved (i.e.. custody conflicts) to maintain confidentiality
  - e. Use discretion in determining how much information will be given to the students, based on their ages and maturity
  - f. Instruct proctors to provide information to the students in a calm and reassuring manner

## Lockdown Procedures

### The assigned designee will:

1. Notify the Sheriff's Department
2. Notify the Executive Director or designee of the *Lockdown* as soon as possible
3. Assign an employee to monitor the main entrance(s) to allow legitimate visitors to enter
4. Notify the proctors in the fastest possible manner that a *Lockdown* has been called
5. Notify parents of the lockdown status
6. Will set up a 10 minute break release schedule (situation allowing), if the *Lockdown* continues during teachers break or lunch period
7. Delay dismissal until it is safe for students to exit

8. Will inform all staff that the *Lockdown* has ended, once it has been determined that the dangerous situation no longer exists

#### Proctors will:

1. Keep all students indoors under their supervision for the duration of the *Lockdown*
2. Lock classroom doors, if directed by the Excel Academy assigned Lead, designee, or senior employee
3. Contact the Excel Academy assigned Lead, designee, or senior employee to determine if the situation allows for students to leave the room to go to the bathroom
4. Escort any student who goes to the bathroom
5. Will not dismiss students at dismissal time until receiving direction to do so by the Excel Academy assigned Lead, designee, or senior employee
6. Escort their students to the site parent pick-up location

Excel Academy employee will: Notify the Executive Director or designee

#### Explosion

In the event an explosion occurs in a location where an Excel Academy employee is present or may be meeting with parents and/or students, the following actions will be taken in the event of an explosion:

#### During an Explosion:

1. Get under a sturdy table or desk if things are falling around you. When they stop falling, leave quickly, watching for obviously weakened floors and stairways.
2. Do not use elevators.
3. Stay low if there is smoke. Do not stop to retrieve personal possessions or make phone calls.
4. **Check for fire** and other hazards.
5. If you are able to move and evacuate the area to a safe location, relocate students and parents who can be safely moved.
6. Once you are out, do not stand in front of windows, glass doors or other potentially hazardous areas.
7. If you are trapped in debris, use a flashlight, whistle or tap on pipes to signal your location to rescuers.
8. Shout only as a last resort to avoid inhaling dangerous dust.
9. Cover your nose and mouth with anything you have on hand.
10. Once you reach a safe area, contact 911 to report the emergency.
11. Contact a school administrator to inform them of the situation.

#### After an Explosion:

1. There may be significant numbers of casualties or damage to buildings and infrastructure.
2. Heavy law enforcement involvement at local, state and federal levels.
3. Health and mental health resources in the affected communities can be strained to their limits, maybe even overwhelmed.
4. Extensive media coverage, strong public fear and international implications and consequences.
5. Workplaces and schools may be closed, and there may be restrictions on domestic and international travel.
6. You and your family or household may have to evacuate an area, avoiding roads blocked for your safety.
7. Clean-up may take many months.

#### TOR's Responsibilities:

1. Investigate and sound the fire alarm if appropriate.
2. Call 911 and report the situation.
3. Notify the school Executive Director, designee or other appropriate school official.
4. Students and staff must not return until the fire department officials declare the area safe.
5. The "Drop & Cover" command will be given immediately in the event of an explosion. If the explosion occurs within the building or threatens the building, the teachers will evacuate students from the building.

This information is primarily drawn from Ready.gov. For more information on preparing for a power outage, please visit: <https://www.ready.gov/explosions>

#### Gas/Fumes

1. If you smell gas or unfamiliar chemicals/fumes, evacuate the location immediately.
2. Take students, parents, and other employees with you. If you are the most senior employee, take roll of everyone present.
3. Call 911 and report the emergency
4. Notify the Executive Director, designee or other appropriate school official

#### Main Office

The main Excel Academy office is located in a rented facility that does not have an emergency plan (Appendix P: Sites Utilized by Excel Academy-Contact Information). Based on a site map, the school developed an emergency evacuation plan ([Appendix F: Excel Academy Office Evacuation Map](#)). The staff and any additional individuals in attendance will follow the protocol for emergency evacuations and safety as per the following guidelines. In an effort to promote the safety of the staff, the development of

clear roles of responsibility, collection of emergency staff information, and maintenance of a first aid kits is outlined as follows:

## Response to Public Relief Agencies Using Excel Academy Facilities

In the event that a Public Relief Agency, such as the Red Cross, requests to use Excel Academy's Main Office, an emergency Board meeting will be convened to articulate a response. In the event that the request is approved, all staff members at the Excel Academy Office shall:

1. Notify the office park owner and neighboring businesses.
2. Trust the Relief Agency members and external emergency responders who have been trained to deal with crises. Trust will help calm the situation and minimize chaos that may occur during a crisis.
3. Give the agency full access to the facility.
4. Provide assistance to the agency under the agency's guidance.

## Learning Period Meetings

The purpose of the Learning Period Meeting (LPM) is for the credentialed teacher to meet with the student to provide educational support, document learning, and to complete other administrative tasks every twenty school days. These meetings occur in public locations, such as a library. Parents/Guardians are expected to be present during the LPM..

If, during an LPM, an incident arises that poses a safety threat to the student the parent/guardian would be responsible for deciding the appropriate course of action for their child. In the event the parent was not present or incapable, please follow the procedures detailed above.

## Testing Sites

In the event that the School(s) are performing assessments in-person the following procedures will be followed. Furthermore, if testing is conducted virtually the following procedure is not necessary.

Excel Academy conducts testing at various sites. Because these venues are not owned by Excel Academy, the Assessment Lead will make an effort to obtain the site plans from the venue and bring awareness to the staff of all site-specific emergency plans. Developing clear roles of responsibility, providing emergency student information to staff, and maintaining first aid training and kits is outlined as follows:

### Assessment Lead (AL) Responsibilities

1. *Adult and Pediatric First Aid/CPR/AED Certified*



2. Complete *Safe Schools Training - School Intruders, Active Shooter, Safety Basics for Security Staff & Medication Administration: Epinephrine Auto-Injectors*
3. Responsible for overall direction and coordination of emergency response effort during an incident
4. Obtain Site Emergency Plans
5. Provided copy of Testing Site section of Plan
6. Obtain Site Emergency Evacuation Map
7. Designate an evacuation area and exits and clearly mark on site map
8. Provide staff with ID/lanyards
9. Maintain a current list of all proctors and students on site
10. Provide site specific safety training for proctors, and ensure all staff is aware of site exits
11. Complete [Incident Report](#) as needed for any medical concerns: minor cut, illness, allergic reaction, nosebleed, emotional upset, etc.
12. Establish designated evacuation area(s) and exits and clearly mark on site map

#### Assessment Site Designee

1. *Adult and Pediatric First Aid/CPR/AED Certified*
2. Complete *Safe Schools Training - School Intruders, Active Shooter, Safety Basics for Security Staff & Medication Administration: Epinephrine Auto-Injectors*
3. Responsible for ensuring the site is safe
4. Provided copy of Testing Site section of Plan
5. Support Assessment Lead as needed
6. Complete [Incident Report](#) as needed for any medical concerns: any serious medical concerns: illness, allergic reaction, severe emotional upset, etc.

#### Staff/Teacher of Record/Proctor Responsibilities

1. Proctors wear ID/lanyard at all times at test site
2. Proctors wear Excel Academy shirts
3. Attend staff safety and compliance training
4. Provided copy of Testing Site section of Plan
5. Report safety concerns to the Assessment Lead, designee, and/or senior Excel Academy proctor immediately regarding any medical concerns: illness, allergic reaction, severe emotional upset, etc.

#### Student Information

1. Copies of the [CAASPP Site Security forms](#) are kept on file at each testing location
2. Sign in Sheets with Parent Signatures for Sign-In and Pick-Up (Photo ID Required for student release)
3. CAASPP Site Security forms contain student specific allergy and medical alerts

#### Site Supplies

##### *First Aid*

1. CPR/AED Responder - Pack (contains one-way valve face shield)
2. First Aid Kit

3. Gloves (latex free) - Box

### *Emergency Preparedness*

1. Maintain emergency food and water

### *Student Information*

1. Assessment Lead Manual - Safety protocol and procedures listed, testing protocol, CAASPP test site security form
- 2.

### *Parent/Guardian Responsibilities*

Parents and legal guardians of students will be required to complete when applicable:

1. Complete and return a CAASPP Site Security form
2. Field trip permission slips

In case of a declared emergency, students will be released only to persons designated on the applicable form. Parents/guardians are responsible for ensuring that information on all forms is current at all times. ([Appendix A: Emergency Contact information in Paycom](#), [Appendix M: CAASPP Site Security form](#), [Appendix B: Excel Academy Field Trip Permission Slip and Waiver](#))

## Field Trips & Overnight/Drop-Off Field Trips

Excel Academy hosts field trips at various venues. Because these venues are public locations, the staff, students, and families in attendance will follow the protocol for emergency evacuations and safety as per the venue guidelines. Excel Academy field trips require parent participation and therefore all students must be in the care of a parent/guardian.

This policy also outlines school guidelines for field trips where students are dropped off by their parents.

### Field Trip Coordinator

1. Train ToRs and ensure they follow all responsibilities as outlined in the field trip policy and in the bullets listed below.
2. Maintain a current list of all chaperones and students on site
3. Identify the method of communication between Field Trip Coordinator and chaperones in the event of unforeseen events(assign designee if not present)
4. Provide necessary safety trainings if applicable
5. SafeSchools Training - First Aid
6. Emergency Apps downloaded on phone/iPad
  - a. Red Cross First Aid
7. Collect all Field Trip Permission Slip and Waivers from students in attendance
8. Inform parents of the Field Trip Coordinator and chaperone contact information for safety concerns that occur during the trip (assign designee if not present)

9. Support the venue's direction and coordination of emergency response effort during an incident
10. Contact the Executive Director or designee in the event of an emergency
11. Complete Incident Report as needed for escalated medical concerns: serious illness, allergic reaction, severe emotional upset, etc. (Appendix K -Incident Report)
12. Bring first aid kit to field trip when present
13. Communicate expectations, procedures, and what to bring for parents
14. Communicate expectations, procedures, and what to bring for chaperones
15. Designate roles and responsibilities amongst the chaperones
16. Provide chaperones:
  - a. Lists of students in attendance
  - b. Signs for chaperones
  - c. Evacuation procedures for the site
17. First aid kits should be available on each field trip
18. Investigate and communicate site evacuation procedures
19. Follow-up with chaperones after the field trip

#### Field Trip Coordinator will be expected to:

1. Clearly communicate expectations to parents, students, and chaperones in advance.
2. Provide and collect all necessary information.
3. Be available the day of the trip to answer questions and troubleshoot. Have all duties covered, so that they are available when needed.

#### Teacher of Record Chaperone Responsibilities:

1. Be on time and prepared to monitor participants Report safety concerns to Field Trip Coordinator and designee immediately
2. Support Field Trip Coordinator as needed
3. Support the venue's direction and coordination of emergency response effort during an incident
4. Inform Field Trip Coordinator of any escalated medical concerns: serious illness, allergic reaction, severe emotional upset, etc. Ensure that the student is provided with the appropriate care and/or medical attention if necessary.

#### Parent/Guardian Responsibilities:

Prior to the field trip, an email will be sent to each parent (chaperones will be cc'd on this email) outlining the expectations and procedures for the field trip, including details about the meeting location, where to park, what to bring (permission slip filled out ahead of time), and student behavior expectations.

Parents are required to notify the applicable Excel Academy staff member of the field trip ahead of time regarding a student's special needs as outlined in an IEP or 504 plan. All students that would be under the direct care of Excel Academy staff under a state of emergency would remain under the supervision of school staff. Students would be released to the designated parent/guardian upon direction of the Executive Director or designee.

Parents and legal guardians of students will be required to complete when applicable:

1. Field trip permission slips and liability waiver forms

#### Parents will be expected to:

1. Arrive on time
2. Review all provided information and explain student behavior expectations to their student(s)
3. Follow details about the field trip outlined by the Field Trip Coordinator
4. Remain in attendance to supervise their own students

#### Student will be expected to:

1. Follow guidelines set by the Field Trip Coordinator
2. Stay with the assigned chaperone/group
3. Follow behavior expectations

#### Chaperone:

To be prepared and provided to the chaperones at the beginning of the trip:

1. List of students in their group, including:
  - a. Parent's name and number (cell)
  - b. Any IEP, allergy, behaviors
  - c. Back-up number
  - d. Name of student's TOR
  - e. Emergency contact - ensure pick up person is included
  - f. Chaperone will collect any missing information from the parents at the time of drop off
2. A sign for helping parents locate the assigned group
  - a. Sign could include group name/color/letters of the alphabet, chaperone name, Excel Academy logo
3. Equipping the chaperone with any tools needed for meeting the students needs, and made aware if another chaperone or parent is coming along during the trip
4. The school and vendor's emergency evacuation procedures
5. Have Field Trip Coordinator's cell phone programmed into their cell phone
6. All chaperones on a group text in case of an emergency or evacuation
7. Made aware of the check in and out procedures and their role in the process

### Chaperone will be expected to:

1. Arrive on time (to be determined by the Field Trip Coordinator)
2. Wear Excel Academy apparel
3. When a parent arrives, they will check the list and ensure all the student information and parent contact information is current
4. Answer cell phones & texts--a texting group or tool will be used

### Additional Resources

- Children and Youth Preparedness Social Media Toolkit:  
<https://www.ready.gov/youth-toolkit>
- Preparing Makes Sense for People with Disabilities, Others with Access and Functional Needs, and the Whole Community:  
[https://www.fema.gov/media-library-data/1440775327070-3e00ff335d637a63551092a24d585301/SpecialNeeds\\_LargePrint\\_v3.pdf](https://www.fema.gov/media-library-data/1440775327070-3e00ff335d637a63551092a24d585301/SpecialNeeds_LargePrint_v3.pdf)
- Individuals with Disabilities:  
<https://www.ready.gov/individuals-access-functional-needs>

## C. Suspension/Expulsion Policies and Procedures

*Governing Law: The procedures by which pupils can be suspended or expelled from the charter school for disciplinary reasons or otherwise involuntarily removed from the charter school for any reason. These procedures, at a minimum, shall include an explanation of how the charter school will comply with federal and state constitutional procedural and substantive due process requirements that is consistent with all of the following:*

*(i) For suspensions of fewer than 10 days, provide oral or written notice of the charges against the pupil and, if the pupil denies the charges, an explanation of the evidence that supports the charges and an opportunity for the pupil to present their side of the story.*

*(ii) For suspensions of 10 days or more and all other expulsions for disciplinary reasons, both of the following:*

*(I) Provide timely, written notice of the charges against the pupil and an explanation of the pupil's basic rights.*

*(II) Provide a hearing adjudicated by a neutral officer within a reasonable number of days at which the pupil has a fair opportunity to present testimony, evidence, and witnesses and confront and cross-examine adverse witnesses, and at which the pupil has the right to bring legal counsel or an advocate.*

*(iii) Contain a clear statement that no pupil shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the pupil has been provided written notice of intent to remove the pupil no less than five schooldays before the effective date of the action. The written notice shall be in the native language of the pupil or the pupil's parent or guardian or, if the pupil is a foster child or youth or a homeless child or youth, the pupil's educational rights holder, and shall inform him or her of the right to initiate the procedures specified in clause (ii) before the effective date of the action. If the pupil's parent, guardian, or educational rights holder initiates the procedures specified in clause (ii), the pupil shall remain enrolled and shall not be removed until the charter school issues a final decision. For purposes of this clause, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include suspensions specified in clauses (i) and (ii). – California Education Code Section 47605(b)(5)(J)*

Policy:



This Pupil Suspension and Expulsion Policy has been established in order to promote learning, provide for the safety of students, staff, and visitors to Excel Academy and serve the best interests of students and their parents or guardians. In creating this policy, the Charter School reviewed Education Code Section 48900 *et seq.*, which describes the non-charter schools' list of offenses and procedures to establish its 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 Excel Academy'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. Excel Academy staff shall enforce disciplinary rules and procedures fairly and consistently among all students. This Policy and its Procedures will be printed and distributed as part of the Student Handbook and will clearly describe discipline expectations. Excel Academy will develop a procedure for the periodic review and amendment of this Policy and, in particular, the lists of offenses for suspension or expulsion.

Excel Academy administration shall ensure that students and their parents/guardians are notified in writing upon enrollment of all discipline and involuntary disenrollment policies and procedures. The notice shall state that this Policy and Procedures are available on request.

Corporal punishment shall not be used as a disciplinary measure against any student. For purposes of the Policy, corporal punishment does not include an employee's use of force that is reasonable and necessary to protect the employee, students, staff or other persons or to prevent damage to school property. Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.

A student identified as an individual with disabilities or for whom Excel Academy has a basis of knowledge of a suspected disability pursuant to the Individuals with Disabilities Education Improvement Act of 2004 ("IDEA") or who is qualified for services under Section 504 of the Rehabilitation Act of 1973 ("Section 504") is subject to the same grounds for suspension and expulsion and is accorded the same due process procedures applicable to general education students except when federal and state law mandates additional or different procedures. Excel Academy will follow all applicable federal and state laws including but not limited to the California Education Code, when imposing any form of discipline on a student identified as an individual with disabilities or for whom Excel Academy has a basis of knowledge of a suspected

disability or who is otherwise qualified for such services or protections in according due process to such students.

No student shall be involuntarily removed by the Charter School for any reason unless the parent or guardian of the student has been provided written notice of intent to remove the student no less than five schooldays before the effective date of the action. The written notice shall be in the native language of the student or the student's parent or 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 them of the basis for which the pupil is being involuntarily removed and their right to request a hearing to challenge the involuntary removal. If a parent, guardian, or educational rights holder requests a hearing, the Charter School shall utilize the same hearing procedures specified below for expulsions, before the effective date of the action to involuntarily remove the student. If the student's parent, guardian, or educational rights holder requests a hearing, the student shall remain enrolled and shall not be removed until the Charter School issues a final decision. As used herein, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include removals for misconduct which may be grounds for suspension or expulsion as enumerated below.

#### Outline of Responsibilities that May Result in Involuntary Removal

##### Attendance:

The credentialed teacher of record awards attendance in accordance with applicable law and based on two criteria:

1. The overall amount of learning completed/attained and
2. That some learning occurred on each date of attendance. As indicated in the Governing Board independent study policy, once a student has three missed assignments during a given learning period, the student is no longer in good standing. For purposes of attendance, three assignments are defined as 30% of the assigned learning for the given learning period. The student must complete at least 70% of the learning for that period and must be able to demonstrate that learning to the teacher of record in order to remain in good standing. The credentialed teacher of record uses their professional determination to assign the percent of learning that occurred. Additionally, the student must bring a work sample that aligns to their learning in each of the courses in which the student is enrolled.

Additionally, the student and parent/guardian must attend all scheduled learning period meetings. Missing a meeting results in zero attendance being awarded and a second meeting must be scheduled within five days to evaluate if attendance may be claimed.

## I. Grounds for Suspension and Expulsion of Students

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 including, but not limited to (a) while on school grounds; (b) while going to or coming from school; (c) during the lunch period, whether on or off the school campus; (d) during, or while going to or coming from a school-sponsored activity.

## II. Enumerated Offenses

### 1. Discretionary Suspension Offenses

1. Students may be suspended for any of the following acts when it is determined the pupil:
  - a. Caused, attempted to cause, or threatened to cause physical injury to another person.
  - b. Willfully used force or violence upon the person of another, except self-defense.
  - c. Unlawfully possessed, used, or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind.
  - d. Unlawfully offered, arranged, or negotiated to sell a controlled substance as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind, and then sold, delivered, or otherwise furnished to any person another liquid, substance, or material and represented same as a controlled substance, alcoholic beverage, or intoxicant.
  - e. Committed or attempted to commit robbery or extortion.
  - f. Caused or attempted to cause damage to school property or private property, which includes, but is not limited to, electronic files and databases.
  - g. Stole or attempted to steal school property or private property, which includes, but is not limited to, electronic files and databases.
  - h. Possessed or used tobacco, or products containing tobacco or nicotine products, including, but not limited to, cigarettes, cigars, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets, vaping, e-cigarettes and betel. This section does not prohibit the use of their own prescription products by a pupil.
  - i. Committed an obscene act or engaged in habitual profanity or vulgarity.
  - j. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.
  - k. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties. This section shall apply to pupils in any of grades 4 to 12, inclusive.

- l. Knowingly received stolen school property or private property, which includes, but is not limited to, electronic files and databases.
- m. Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
- n. Harassed, threatened, or intimidated a pupil who is a complaining witness or a witness in a school disciplinary proceeding for purposes of either preventing that pupil from being a witness and/or retaliating against that pupil for being a witness.
- o. Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.
- p. Engaged in, or attempted to engage in, hazing. For purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this subdivision, "hazing" does not include athletic events or school-sanctioned events.
- q. Made terroristic threats against school officials and/or school property, which includes but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear of their own safety or for their immediate family's safety, or for the protection of school property, which includes but is not limited to, electronic files and databases, or the personal property of the person threatened or their immediate family.
- r. Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.
- s. Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the

Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.

- t. Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.
  - u. Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.
2. "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 student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has been reasonably predicted to have the effect of one or more of the following:
- a. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of their age, or for a person of their age with exceptional needs) or students in fear of harm to that student's or those students' person or property.
  - ii. Causing a reasonable student to experience a substantially detrimental effect on their physical or mental health.
  - b. Causing a reasonable student to experience substantial interference with their academic performance.
  - c. Causing a reasonable student to experience substantial interference with their ability to participate in or benefit from the services, activities, or privileges provided by the Charter School.
3. "Electronic Act" means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:
- a. A message, text, sound, video, or image.
  - b. A post on a social network Internet Web site including, but not limited to:
    - i. Posting to or creating a burn page. A "burn page" means an Internet Web site created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
    - ii. Creating a credible impersonation of another actual pupil for the purpose of having one or more of the effects listed in subparagraph (1) above. "Credible impersonation" means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would

- reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.
- iii. Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (I) above. "False profile" means a profile of a fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.
  - iv. An act of cyber sexual bullying.
  - v. A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, pursuant to this section, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1)(a)-(b).
  - vi. Possessed, sold, or otherwise furnished any knife unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Executive Director or designee's concurrence

For a pupil subject to discipline under this section, the Executive Director may use his or her discretion to provide alternatives to suspension or expulsion that are age appropriate and designed to address and correct the pupil's specific misbehavior.

## 2. Non-Discretionary Suspension Offenses:

Students must be suspended and recommended for expulsion for any of the following acts when it is determined the pupil:

1. Possessing, selling, or otherwise furnishing any firearm, explosive, or other dangerous object unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Executive Director or designee's concurrence.
2. Brandishing a knife at another person.
3. Unlawfully selling a controlled substance listed in Health and Safety Code section 11053 *et seq.*
4. Committing or attempting to commit a sexual assault or committing a sexual battery, as defined in Education Code 48900(n).



### 3. Discretionary Expellable Offenses:

Students may be recommended for expulsion for any of the following acts when it is determined the pupil:

- a. Caused, attempted to cause, or threatened to cause physical injury to another person.
- b. Willfully used force or violence upon the person of another, except self- defense.
- c. Unlawfully possessed, used, sold or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind.
- d. Unlawfully offered, arranged, or negotiated to sell a controlled substance as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind, and then sold, delivered, or otherwise furnished to any person another liquid, substance, or material and represented same as a controlled substance, alcoholic beverage, or intoxicant.
- e. Committed or attempted to commit robbery or extortion.
- f. Caused or attempted to cause damage to school property or private property, which includes, but is not limited to, electronic files and databases.
- g. Stole or attempted to steal school property or private property, which includes, but is not limited to, electronic files and databases.
- h. Possessed or used tobacco, or products containing tobacco or nicotine products, including, but not limited to, cigarettes, cigars, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets, vaping devices, electronic cigarettes, pills and betel. This section does not prohibit the use of his or her own prescription products by a pupil.
- i. Committed an obscene act or engaged in habitual profanity or vulgarity.
- j. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.
- k. Knowingly received stolen school property or private property, which includes, but is not limited to, electronic files and databases.
- l. Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
- m. Harassed, threatened, or intimidated a pupil who is a complaining witness or a witness in a school disciplinary proceeding for purposes of either preventing that pupil from being a witness and/or retaliating against that pupil for being a witness.
- n. Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.
- o. Engaged in, or attempted to engage in, hazing. For purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a pupil organization or

body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this subdivision, "hazing" does not include athletic events or school-sanctioned events.

- p. Made terroristic threats against school officials and/or school property, which includes but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for their own safety or for their immediate family's safety, or for the protection of school property, which includes but is not limited to, electronic files and databases, or the personal property of the person threatened or their immediate family.
- q. Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.
- r. Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to pupils in any of grades 4 to 12, inclusive.
- s. Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This section shall apply to pupils in any of grades 4 to 12, inclusive.
- t. Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.
  - a. A message, text, sound, video, or image.
  - b. A post on a social network Internet Web site including, but not limited to:

- i. Posting to or creating a burn page. A "burn page" means an Internet Web site created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
  - ii. Creating a credible impersonation of another actual pupil for the purpose of having one or more of the effects listed in subparagraph (1) above. "Credible impersonation" means to knowingly and without consent impersonate a pupil for the purpose of bullying the pupil and such that another pupil would reasonably believe, or has reasonably believed, that the pupil was or is the pupil who was impersonated.
  - iii. Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. "False profile" means a profile of a fictitious pupil or a profile using the likeness or attributes of an actual pupil other than the pupil who created the false profile.
- c. An act of cyber sexual bullying.
  - i. For purposes of this clause, "cyber sexual bullying" means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a pupil to another pupil or to school personnel by means of an electronic act that has or will be reasonably predicted to have one or more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other electronic act.
  - ii. For purposes of this clause, "cyber sexual bullying" does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.
  - iii. Notwithstanding the subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.
- d. A pupil who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, pursuant to this section, except that a pupil who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1)(a)-(b).

- e. Possessed, sold, or otherwise furnished any knife unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Executive Director or designee's concurrence.

#### 4. Non-Discretionary Expellable Offenses:

Students must be recommended for expulsion for any of the following acts when it is determined pursuant to the procedures below that the pupil:

- a. Possessing, selling, or otherwise furnishing any firearm, explosive, or other dangerous object unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Executive Director or designee's concurrence.
- b. Brandishing a knife at another person.
- c. Unlawfully selling a controlled substance listed in Health and Safety Code section 11053 *et seq.*
- d. Committing or attempting to commit a sexual assault or committing a sexual battery, as defined in Education Code 48900(n).

If it is determined by the Board of Directors that a student has brought a firearm or destructive device, as defined in Section 921 of Title 18 of the United States Code, on to campus or to have possessed a firearm or dangerous device on campus, the student shall be expelled for one year, pursuant to the Federal Gun Free Schools Act of 1994. In such instances, the pupil shall be provided due process rights of notice and a hearing as required in this policy.

The term "firearm" means (A) any weapon (including a starter gun) which will or is designed to or may readily be converted to expel a projectile by the action of an explosive; (B) the frame or receiver of any such weapon; (C) any firearm muffler or firearm silencer; or (D) any destructive device. Such a term does not include an antique firearm.

The term "destructive device" means (A) any explosive, incendiary, or poison gas, including but not limited to: (i) bomb, (ii) grenade, (iii) rocket having a propellant charge of more than four ounces, (iv) missile having an explosive or incendiary charge of more than one-quarter ounce, (v) mine, or (vi) device similar to any of the devices described in the preceding clauses.

### III. Suspension Procedure

Suspensions shall be initiated according to the following procedures:

#### Conference

Suspension shall be preceded, if possible, by a conference conducted by the Executive Director or designee with the student and their parent and whenever practical, the teacher, supervisor or Excel Academy employee who referred the student to the Executive Director or designee.

The conference may be omitted if the Executive Director or designee determines that an emergency situation exists. An "emergency situation" is one that involves a clear and present danger to the lives, safety, or health of students or Charter School personnel. If a student is suspended without this conference, both the parent/guardian and student shall be notified of the student's right to return to school for the purpose of a conference.

At the conference, the pupil shall be informed of the reason for the disciplinary action and the evidence against them, and shall be given the opportunity to present their version and evidence in their defense, in accordance with Education Code Section 47605(b)(5)(J)(i).

This conference shall be held within (2) two school days unless the pupil waives this right or is physically unable to attend for any reason including, but not limited to, incarceration or hospitalization. No penalties may be imposed on a pupil for failure of the pupil's parent or guardian to attend a conference with Excel Academy officials. Reinstatement of the suspended pupil shall not be contingent upon attendance by the pupil's parent or guardian at the conference.

#### Notice to Parents/Guardians

At the time of the suspension, an administrator or designee shall make a reasonable effort to contact the parent/guardian by telephone or in person. Whenever a student is suspended, the parent/guardian shall be notified in writing of the suspension and the date and time the student may return to school following suspension. This notice shall state the specific offense committed by the student and include notice of any due process rights regarding suspension or expulsion. If Charter School officials wish to ask the parent/guardian to confer regarding matters pertinent to the suspension, the notice may request that the parent/guardian respond to such requests without delay.

### Suspension Time Limits/Recommendation for Expulsion

Suspensions, when not including a recommendation for expulsion, shall not exceed five (5) consecutive school days per suspension. The total number of days of suspension shall not exceed twenty (20) school days per year. Upon a recommendation of expulsion by the Executive Director or designee, the pupil and the pupil's parent/guardian or representative will be invited to a conference to determine if the suspension for the pupil must be extended pending an expulsion hearing. In such instances when the Charter School has determined a suspension period shall be extended, such extension shall be made only after a conference is held with the pupil or the pupil's parents, unless the pupil and the pupil's parents fail to attend the conference.

This determination will be made by the Executive Director or designee upon either of the following: 1) the pupil's presence will be disruptive to the education process; or 2) the pupil poses a threat or danger to others. Upon either determination, the pupil's suspension will be extended pending the results of an expulsion hearing.

### IV. Authority to Expel

As required by Education Code Section 47605(b)(5)(J)(ii), students recommended for expulsion are entitled to a hearing adjudicated by a neutral officer to determine whether the student will be expelled. The procedures herein provide for such a hearing and the notice of said hearing, as required by law.

A student may be expelled by the neutral and impartial Charter School Board of Directors following a hearing before it. The Board of Directors may be presided over by a designated neutral hearing chairperson. The Board of Directors may make the final determination whether or not to expel the student.

### V. Expulsion Procedures

Students recommended for expulsion are entitled to a hearing to determine whether the student will be expelled. Unless postponed for good cause, the hearing may be held within thirty (30) school days after the Executive Director or designee determines that the pupil has committed an expellable offense.

The hearing may be held in closed session (complying with all pupil confidentiality rules under FERPA) unless the pupil makes a written request for a public hearing in open session three (3) days prior to the date of the scheduled hearing.



Written notice of the hearing may be forwarded to the student and the student's parent/guardian at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it may be deemed served upon the pupil. The notice shall include:

1. The date and place of the expulsion hearing;
2. A statement of the specific facts, charges and offenses upon which the proposed expulsion is based;
3. A copy of the Charter School's disciplinary rules which relate to the alleged violation;
4. Notification of the student's or parent/guardian's obligation to provide information about the student's status at the Charter School to any other school district or school to which the student seeks enrollment;
5. The opportunity for the student and/or the student's parent/guardian to appear in person or to employ and be represented by counsel or a non-attorney advisor;
6. The right to inspect and obtain copies of all documents to be used at the hearing;
7. The opportunity to confront and question all witnesses who testify at the hearing;
8. The opportunity to question all evidence presented and to present oral and documentary evidence on the student's behalf including witnesses.

## VI. Special Procedures for Expulsion Hearings Involving Sexual Assault or Battery Offenses:

1. The Charter School may, upon a finding of good cause, determine that the disclosure of either the identity of the witness or the testimony of that witness at the hearing, or both, would subject the witness to an unreasonable risk of psychological or physical harm. Upon this determination, the testimony of the witness may be presented at the hearing in the form of sworn declarations that shall be examined only by the Charter School or the hearing officer. Copies of these sworn declarations, edited to delete the name and identity of the witness, shall be made available to the pupil.
2. The complaining witness in any sexual assault or battery case must be provided with a copy of the applicable disciplinary rules and advised of their right to (a) receive five days' notice of their scheduled testimony, (b) have up to two (2) adult support persons of their choosing present in the hearing at the time they testify, which may include a parent, guardian, or legal counsel, and (c) elect to have the hearing closed while testifying.
3. Excel Academy must also provide the victim a room separate from the hearing room for the complaining witnesses use prior to and during breaks in testimony.

4. At the discretion of the entity conducting the hearing, the complaining witness shall be allowed periods of relief from examination and cross-examination during which they may leave the hearing room.
5. The entity conducting the expulsion hearing may also arrange the seating within the hearing room to facilitate a less intimidating environment for the complaining witness.
6. The entity conducting the expulsion hearing may also limit time for taking the testimony of the complaining witness to the hours they are normally in school, if there is no good cause to take the testimony during other hours.
7. Prior to a complaining witness testifying, the support persons must be admonished that the hearing is confidential. Nothing in the law precludes the entity presiding over the hearing from removing a support person whom the presiding person finds is disrupting the hearing. The entity conducting the hearing may permit any one of the support persons for the complaining witness to accompany the witness stand.
8. If one or both of the support persons is also a witness, Excel Academy must present evidence that the witness's presence is both desired by the witness and will be helpful to the Charter School. The entity presiding over the hearing shall permit the witness to stay unless it is established that there is a substantial risk that the testimony of the complaining witness would be influenced by the support person, in which case the presiding official shall admonish the support person or persons not to prompt, sway, or influence the witness in any way. Nothing shall preclude the presiding officer from exercising their discretion to remove a person from the hearing whom they believe is prompting, swaying, or influencing the witness.
9. The testimony of the support person shall be presented before the testimony of the complaining witness and the complaining witness shall be excluded from the courtroom during that testimony.
10. Especially for charges involving sexual assault or battery, if the hearing is to be conducted in public at the request of the pupil being expelled, the complaining witness shall have the right to have their testimony heard in a closed session when testifying at a public meeting would threaten serious psychological harm to the complaining witness and there are no alternative procedures to avoid the threatened harm. The alternative procedures may include videotaped depositions or contemporaneous examination in another place communicated to the hearing room by means of closed-circuit television.
11. Evidence of specific instances of a complaining witness' prior sexual conduct is presumed inadmissible and shall not be heard absent a determination by the entity conducting the hearing that extraordinary circumstances exist requiring the evidence be heard. Before such a determination regarding extraordinary circumstances will be made, the witness shall be provided notice and an opportunity to present opposition to the introduction of the evidence. In the hearing on the admissibility of the evidence, the complaining witness shall be entitled to be represented by a parent, legal counsel, or other support person.

Reputation or opinion evidence regarding the sexual behavior of the complaining witness is not admissible for any purpose.

## VII. Record of Hearing

A record of the hearing shall be made and may be maintained by any means, including electronic recording, as long as a reasonably accurate and complete written transcription of the proceedings will be made.

## VIII. Presentation of Evidence

While technical rules of evidence do not apply to expulsion hearings, evidence may be admitted and used as proof only if it is the kind of evidence on which reasonable persons will rely in the conduct of serious affairs. A decision by the Board of Directors to expel must be supported by substantial evidence that the student committed an expellable offense. Findings of fact shall be based solely on the evidence at the hearing. While hearsay evidence is admissible, no decision to expel shall be based solely on hearsay. Sworn declarations may be admitted as testimony from witnesses of whom the Board determines that disclosure of their identity or testimony at the hearing may subject them to an unreasonable risk of physical or psychological harm.

If, due to a written request by the expelled pupil, the hearing is held at a public meeting, and the charge is committing or attempting to commit a sexual assault or committing a sexual battery as defined in Education Code Section 48900, a complaining witness shall have the right to have their testimony heard in a session closed to the public.

The decision of the Board of Directors shall be in the form of written findings of fact and a written determination regarding the expulsion. The final decision by the Board of Directors shall be made within ten (10) school days following the conclusion of the hearing. The decision of the Board of Directors is final.

If the Board of Directors decides not to expel, the pupil shall immediately be returned to their educational program.

## IX. Written Notice to Expel

The Executive Director or designee, following a decision of the Board of Directors to expel, shall send written notice of the decision to expel, including the Board of Directors' adopted findings of fact, to the student or parent/guardian. This notice shall also include the following: (a) Notice of the specific offense committed by the student;

and (b) Notice of the student's or parent/guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with the Charter School.

The Executive Director or designee shall send a copy of the written notice of the decision to expel the authorizer. This notice shall include the following: (a) The student's name; and (b) The specific expellable offense committed by the student.

## X. Disciplinary Records

The Charter School shall maintain records of all student suspensions and expulsions at the Charter School. Such records shall be made available to the authorizer upon request.

## XI. No Right to Appeal

The pupil shall have no right of appeal from expulsion from the Charter School as the Charter School Board of Directors' decision to expel shall be final.

## XII. Expelled Pupils/Alternative Education

Parents/guardians of pupils who are expelled shall be responsible for seeking alternative education programs including, but not limited to, programs within the County for their school district of residence. The Charter School shall work cooperatively with parents/guardians as requested by parents/guardians or by the school district of residence to assist with locating alternative placements during expulsion.

## XIII. Rehabilitation Plans

Students who are expelled from Excel Academy shall be given a rehabilitation plan upon expulsion as developed by the administrative panel at the time of the expulsion order, which may include, but is not limited to, periodic review as well as assessment at the time of review for readmission. The rehabilitation plan must include a date not later than one year from the date of expulsion when the pupil may reapply to Excel Academy for readmission.

#### XIV. Readmission

The decision to readmit a pupil or to admit a previously expelled pupil from another school district or charter school shall be in the sole discretion of Excel Academy's Board of Directors following a meeting with the Executive Director or designee and the pupil and parent/guardian or representative to determine whether the pupil has successfully completed the rehabilitation plan and to determine whether the pupil poses a threat to others or will be disruptive to the school environment. The Executive Director or designee shall make a recommendation to Excel Academy's Board of Directors following the meeting regarding their determination. The Board shall then make a final decision regarding readmission during the closed session of a public meeting, reporting any action taken during closed session consistent with the requirements of the Brown Act. The pupil's readmission is also contingent upon Excel Academy capacity at the time the student seeks readmission.

#### XV. Notice to Teachers

The Charter School shall notify teachers of each pupil who has engaged in or is reasonably suspected to have engaged in any of the acts listed in Education Code Section 49079 and the corresponding enumerated offenses set forth above.

#### XVI. Involuntary Removal for Truancy

As charter schools are schools of choice and as a charter school pupil who fails to meet attendance requirements is potentially depriving another student of their opportunity to enroll, a student may be involuntarily removed as described within the Charter School's Board adopted Independent Study Policy and only after the Charter School follows the requirements of the Independent Study Policy and only in accordance with the policy described above which requires notice and an opportunity for a parent, guardian, educational rights holder to request a hearing prior to any involuntary removal.

#### XVII. Special Procedures for the Consideration of Suspension and Expulsion or Involuntary Removal of Students with Disabilities

##### Notification of SELPA

- a. Excel Academy will immediately notify the SELPA and coordinate the procedures in this policy with the SELPA of the discipline of any student with a

disability or student who Excel Academy or SELPA would be deemed to have knowledge that the student had a disability.

### Services During Suspension

- a. Students suspended for more than ten (10) school days in a school year shall continue to receive services so as to enable the student to continue to participate in the general education curriculum, although in another setting (which could constitute a change of placement and the student's IEP would reflect this change) and to progress toward meeting the goals set out in the child's IEP/504 Plan; and receive, as appropriate, a functional behavioral assessment and behavioral intervention services and modifications, that are designed to address the behavior violation so that it does not recur. These services may be provided in an interim alternative educational setting.

### Procedural Safeguards/Manifestation Determination

- a. Within ten (10) school days of a recommendation for expulsion or any decision to change the placement of a child with a disability because of a violation of a code of student conduct, Excel Academy, the parent, and relevant members of the IEP/504 Team shall review all relevant information in the student's file, including the child's IEP/504 Plan, any teacher observations, and any relevant information provided by the parents to determine:
  - i. If the conduct in question was caused by, or had a direct and substantial relationship to, the child's disability; or
  - ii. If the conduct in question was the direct result of the local educational agency's failure to implement the IEP/504 Plan.
  - iii. If Excel Academy, the parent, and relevant members of the IEP/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.
  - iv. If Excel Academy, the parent, and relevant members of the IEP/504 Team make the determination that the conduct was a manifestation of the child's disability, the IEP/504 Team shall:
    - v. Conduct a functional behavioral assessment or a functional analysis assessment, and implement a behavioral intervention plan for such child, provided that Excel Academy had not conducted such assessment prior to such determination before the behavior that resulted in a change in placement;
    - vi. 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; and
    - vii. Return the child to the placement from which the child was removed, unless the parent and Excel Academy agree to a change of placement as part of the modification of the behavioral intervention plan



- viii. If Excel Academy, the parent, and relevant members of the IEP/504 team determine that the behavior was not a manifestation of the student's disability and that the conduct in question was not a result of the failure to implement the IEP/504, then Excel Academy may apply the relevant disciplinary procedures to children with disabilities in the same manner and for the same duration as the procedures would be applied to students without disabilities.

### Due Process Appeals

- a. The parent of a child with a disability who disagrees with any decision regarding placement, or the manifestation determination, or Excel Academy if it believes that maintaining the current placement of the child is substantially likely to result in injury to the child or to others, may request an expedited administrative hearing through the Special Education Unit of the Office of Administrative Hearings or by utilizing the dispute provisions of the 504 Policy and Procedures.
- b. When an appeal relating to the placement of the student or the manifestation determination has been requested by either the parent or Excel Academy, the student shall remain in the interim alternative educational setting pending the decision of the hearing officer in accordance with state and federal law, including 20 U.S.C. Section 1415(k), or until the expiration of the forty-five (45) day time period provided for in an interim alternative educational setting, whichever occurs first, unless the parent and Excel Academy agree otherwise.
- c. In accordance with 20 U.S.C. Section 1415(k)(3), if a parent/guardian disagrees with any decision regarding placement, or the manifestation determination, or if the Charter School believes that maintaining the current placement of the child is substantially likely to result in injury to the child or to others, the parent/guardian or Charter School may request a hearing.
- d. In such an appeal, a hearing officer may: (1) return a child with a disability to the placement from which the child was removed; or (2) order a change in placement of a child with a disability to an appropriate interim alternative educational setting for not more than 45 school days if the hearing officer determines that maintaining the current placement of such child is substantially likely to result in injury to the child or to others.

### Special Circumstances

- a. Excel personnel may consider any unique circumstances on a case-by-case basis when determining whether to order a change in placement for a child with a disability who violates a code of student conduct.
- b. The Executive Director or designee may remove a student to an interim alternative educational setting for not more than forty-five (45) school days without regard to whether the behavior is determined to be a manifestation of the student's disability in cases where a student:
  - i. Carries or possesses a weapon, as defined in 18 U.S.C. Section 930, to or at school, on school premises, or to or at a school function;

- ii. Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function; or
- iii. Has inflicted serious bodily injury, as defined by 20 U.S.C. Section 1415(k)(7)(D), upon a person while at school, on school premises, or at a school function.

#### Interim Alternative Educational Setting

- a. The student's interim alternative educational setting shall be determined by the student's IEP/504 team.

#### Procedures for Students Not Yet Eligible for Special Education Services

- a. A student who has not been identified as an individual with disabilities pursuant to IDEA and who has violated the District's disciplinary procedures may assert the procedural safeguards granted under these procedures only if Excel had knowledge that the student was disabled before the behavior occurred.
- b. Excel shall be deemed to have knowledge that the student had a disability if one of the following conditions exists:
  - i. The parent/guardian has expressed concern in writing, or orally if the parent/guardian does not know how to write or has a disability that prevents a written statement, to Excel supervisory or administrative personnel, or to one of the child's teachers, that the student is in need of special education or related services; or
  - ii. The parent has requested an evaluation of the child; or
  - iii. The child's teacher, or other Excel personnel, has expressed specific concerns about a pattern of behavior demonstrated by the child, directly to the Director of special education or to other Charter School supervisory personnel.
- c. If Excel knew the student had a disability under any of the three (3) circumstances described above, the student may assert any of the protections available to IDEA- eligible children with disabilities, including the right to stay-put.
- d. If Excel had no basis for knowledge of the student's disability, it shall proceed with the proposed discipline. Excel shall conduct an expedited evaluation if requested by the parents; however, the student shall remain in the education placement determined by Excel pending the results of the evaluation.
- e. Excel shall not be deemed to have knowledge that the student had a disability if the parent has not allowed an evaluation, refused services, or if the student has been evaluated and determined to not be eligible.

## D. Procedures to Notify Teachers of Dangerous Pupils

Per California Ed. Code 49079 and in an effort to ensure the safety of all employees, the school will notify the Teacher of Record or any additional staff as necessary in writing if a pupil has engaged in, or is reasonably suspected to have engaged in any of the acts described in any of the subdivisions, except subdivision (h), of Section 48900 or in Section 48900.2, 48900.3, 48900.4, or 48900.7 as outlined below:

1. Caused, attempted to cause, or threatened to cause physical injury to another person.
2. Willfully used force or violence upon the person of another, except in self-defense.
3. Possessed, sold, or otherwise furnished a firearm, knife, explosive, or other dangerous object, unless, in the case of possession of an object of this type, the pupil had obtained written permission to possess the item from a certificated school employee, which is concurred in by the principal or the designee of the principal.
4. Unlawfully possessed, used, sold, or otherwise furnished, or been under the influence of, a controlled substance, an alcoholic beverage, or an intoxicant of any kind.
5. Unlawfully offered, arranged, or negotiated to sell a controlled substance, an alcoholic beverage, or an intoxicant of any kind, and either sold, delivered, or otherwise furnished to a person another liquid, substance, or material and represented the liquid, substance, or material as a controlled substance, alcoholic beverage, or intoxicant.
6. Committed or attempted to commit robbery or extortion.
7. Caused or attempted to cause damage to school property or private property.
8. Stole or attempted to steal school property or private property.
9. Committed an obscene act or engaged in habitual profanity or vulgarity.
10. Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell drug paraphernalia, as defined in Section 11014.5 of the Health and Safety Code.
11. Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties.
12. Knowingly received stolen school property or private property.
13. Possessed an imitation firearm which would be a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
14. Committed or attempted to commit a sexual assault or committed a sexual battery.

15. Harassed, threatened, or intimidated a pupil who is a complaining witness or a witness in a school disciplinary proceeding for purposes of either preventing that pupil from being a witness or retaliating against that pupil for being a witness, or both.
16. Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drugs.
17. Engaged in, or attempted to engage in, hazing. "Hazing" being a method of initiation or preinitiation into a pupil organization or body, whether or not the organization or body is officially recognized by an educational institution, that is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective pupil. For purposes of this subdivision, "hazing" does not include athletic events or school-sanctioned events.
18. Engaged in an act of bullying. "Bullying" being 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 as defined in Section 48900.2, 48900.3, or 48900.4, directed toward one or more pupils that has or will be reasonably predicted to have the effect of one or more of the following:
  - a. Placing a reasonable pupil or pupils in fear of harm to that pupil's or those pupils' person or property.
  - b. Causing a reasonable pupil to experience a substantially detrimental effect on their physical or mental health.
  - c. Causing a reasonable pupil to experience substantial interference with their academic performance.
  - d. Causing a reasonable pupil to experience substantial interference with their ability to participate in or benefit from the services, activities, or privileges provided by a school.
  - e. A pupil who aids or abets the infliction or attempted infliction of physical injury to another person
  - f. "Electronic act" means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:
    - i. A message, text, sound, or image.
    - ii. A post on a social network Internet Web site, including, but not limited to:
      1. Posting to or creating a burn page. "Burn page"

2. Creating a credible impersonation of another actual pupil
  3. Creating a false profile
- iii. An electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.
- g. "Reasonable pupil" means a pupil, including, but not limited to, an exceptional needs pupil, who exercises average care, skill, and judgment in conduct for a person of their age, or for a person of their age with exceptional needs.

### Notification of Dangerous Pupils

Employees shall promptly report to the Director or other immediate supervisor any attempted assault, or physical threat made against them by a student. Both the employee and the principal or other immediate supervisor shall promptly report such instances to the appropriate local law enforcement agency. (Ed. Code 44014)

In addition, employees shall promptly report to the Director or other immediate supervisor, and may report to law enforcement, any attack, assault, or threat made against them at school related functions including, but not limited to:

- Testing sites
- Field Trips
- School Events
- Learning Period Meetings
- Staff Meetings

Reports of attack, assault, or threat shall be forwarded immediately to the Superintendent or designee. An employee whose person or property is injured or damaged by willful misconduct of a student may ask the district to pursue legal action against the student or the student's parent/guardian (Ed. Code 48905)

In order to maintain confidentiality when providing information about student offenses to counselors and teachers to which a student is assigned, the Director or designee shall send the staff member a written notification that one of their students has committed an offense that requires review of a student's file in the school office. This notice shall not name or otherwise identify the student. The staff member shall be asked to initial the notification and return it to the Director or designee.

### Additional Requirements and Liability as per Ed. Code 49079:

- A. A school district, or school district officer or employee, is not civilly or criminally liable for providing information under this section unless it is proven that the information was false and that the district or district officer or employee knew or should have known that the information was false, or the information was provided with a reckless disregard for its truth or falsity.
- B. An officer or employee of a school who knowingly fails to provide information about a pupil who has engaged in, or who is reasonably suspected to have engaged in, the acts referred to in subdivision (a) is guilty of a misdemeanor, which is punishable by confinement in the county jail for a period not to exceed six months, or by a fine not to exceed one thousand dollars (\$1,000), or both.
- C. Any information received by a teacher or staff pursuant to this section shall be received in confidence for the limited purpose for which it was provided and shall not be further disseminated by the employee.

## E. Discrimination and Harassment

Excel Academy Charter School is committed to protecting its students and staff from the hazards of school and workplace violence, including both physical and verbal threats. Excel Academy has a zero tolerance policy toward threats or acts of violence and will take appropriate disciplinary action against students, parents/guardians and employees who engage in such conduct. It is important that all students, parents/guardians and staff understand the conduct expected at Excel Academy in order to ensure that all parties feel safe.

### Students

Excel Academy believes that all students have the right to be educated in a positive learning environment free from disruptions. At school activities, students shall be expected to exhibit appropriate conduct that does not infringe upon the rights of others or interfere with the school program.

Behavior is considered appropriate when students are diligent in study, careful with school property, courteous, and respectful towards teachers, other staff, students and volunteers. Every effort is made at each site to ensure students are aware of the expected behaviors at a school organized event.

### Parents/Guardians

The school developed a Civility Policy in light of defining the appropriate conduct for parents/guardians in relation to school-related interactions as well as a guide to the proper responses in light of a disruption ([Appendix E: Civility Policy](#)).

### Staff

Staff conduct is equally important and must exhibit professionalism at all times. Since we consider all school staff to be representatives of Excel Academy, the school outlines standards of conduct for all staff members in the employee handbook and defines expectations surrounding the following areas:

- Workplace violence
- Prohibited conduct
- Physical Contact with Students and Other Staff Members
- Off-duty conduct
- Drug and Alcohol Free Workplace and Awareness Program
- Tobacco Free Workplace
- Punctuality and Attendance



- Professionalism
- Dress Code
- Gifts to Employees
- Fee and Cash Collection
- Tuition Assistance
- Building Security

For more information about Excel Academy’s policy on staff conduct, refer to [Appendix F: Excerpt from the EACS Employee Handbook “Section III: Standards of Conduct.”](#)

## Bullying

Bullying creates a hostile environment in schools if it sufficiently and severely interferes with or limits a student’s ability to participate in or benefit from the services, activities, or opportunities offered by the school. The school will establish student safety at all school related functions as a high priority and will not tolerate discrimination, harassment, intimidation, and bullying of any student. Harassment is defined as unwanted conduct based on protected class (e.g., race, color, national origin, religion, gender, age, disability, or sexual orientation).

No student or group of students shall, through physical, written, verbal, non-verbal, gestural, or other means, harass, sexually harass, threaten, intimidate, cyberbully (sexually or otherwise), cause bodily injury to, or commit hate violence against any other student or school personnel. This includes acts of discrimination, harassment, intimidation, and bullying related to school activity or school attendance occurring within a learning center under the jurisdiction of the Director/Principal of CPCS.

*Note: Pursuant to Education Code 32261 48900 and 48900.2-48900.4, the definition of “bullying” for purposes of establishing grounds for suspension or expulsion includes bullying via an electronic act. AB 746 (Ch. 72, Statutes of 2011) amended Education Code 32261 AB 1732 (Ch. 157, Statutes of 2012) amended Education Code 48900 to expand the definition of bullying committed by means of an electronic act to include posting of messages on social media networks; see AR 5144.1 – Suspension and Expulsion/Due Process Involuntary Transfer Back to the District of Residence/Due Process.*

In addition, Penal Code 653.2 makes it a crime for a person to distribute personal identity information electronically with the intent to cause harassment by a third party and to threaten a person’s safety or that of their family (e.g., placing a person’s picture or address online so that they receives harassing messages).

Penal Code 288.2 makes it a crime to send a message to a minor if the message contains matter that is sexual in nature with the intent of seducing the minor (i.e., sexting).

### Cyber-Bullying

Excel Academy expects all students, teachers, administration and vendors to use electronic communications in a responsible, ethical, and legal manner in order to ensure that offensive, harassing or other communication jeopardizing the integrity of Excel Academy has not been made available to other students.

In communicating via email or in Live Sessions you are agreeing that you will use the email or chatting properly for school, will communicate with faculty and students appropriately, and will not partake in cyber-bullying or any form of harassment.

Harassment and cyber-bullying of or by students or instructors will not be tolerated in the online environment.

Cyber bullying (sexual or non-sexual) is an act of bullying committed through the transmission of a message, text, sound, or image by means of an electronic device, including, but not limited to, a telephone, wireless telephone or other wireless communication device, or computer. Cyberbullying includes the transmission of harassing communications, direct threats, or other harmful texts, sounds, or images on the Internet, social media, or other technologies using a telephone, computer, or any wireless communication device. This includes threats, insults, verbal abuse, racial slurs, or any other hostile communications designed to cause harm to others. Offensive content includes, but is not limited to, sexual comments or images, racial slurs, gender-specific comments, or any comments that would offend someone on the basis of age, race, sex, color, religion, national origin, handicap, disability, or veteran status.

Cyberbullying also includes breaking into another person's electronic account and assuming that person's identity in order to damage that person's reputation via a post on a social network Internet Web site, including not limited to posting to or creating a burn page, creating a credible impersonation of another actual pupil, or creating a false profile. Cyber sexual bullying includes, but is not limited to, focusing on the person's appearance, body parts, sexual orientation, or sexual activity through the use of technology.

### Bullying Prevention, Intervention and Reporting

School staff will have access to SafeSchools online training related to the professional development of detecting warning signs, effective prevention strategies, and intervention skills.

School staff who witness an act of discrimination, harassment, intimidation, bullying, hazing, or teasing shall take immediate steps to intervene to stop the incident when it is safe to do so (Education Code 234.1.1b) and notify an Assistant Director. As appropriate, the Director or the Director's designee, will notify the parents/guardians of victims and perpetrators. The Director or the Director's designee also may involve counselors and/or law enforcement as necessary.

Students are encouraged to notify school staff when they are being discriminated against, harassed, intimidated, bullied, hazed, or teased or suspect that another student is being victimized.

#### Disciplinary Action for Students Engaging in Harassment or Cyber-Bullying:

Students who are found engaging in harassing or bullying behavior

- Will have a parent/teacher conference scheduled to discuss the matter and collect and review documentation
- Will receive a warning about possible expulsion for a repeated offense.
- Will be candidates for expulsion dependent on the severity or frequency of the offense.
- Teachers and/or Guidance Counselors will record the documentation in the student's electronic file.

### Sexual Harassment

Excel Academy prohibits sexual harassment of school employees and job applicants. The school also prohibits retaliatory behavior or action against employees or other persons who complain, testify or otherwise participate in the complaint process established pursuant to this policy and the administrative regulation ([Appendix D : Excerpt from EACS Employee Handbook “Section I: Nondiscrimination Policies”](#))

The Excel Academy Administrative team shall take all actions necessary to ensure the prevention, investigation and correction of sexual harassment, including but not limited to:

1. Per AB 1825 and CA Govt. Code Sec. 12950.1, the school will provide supervisory employees within 6 months of their assumption of a supervisory position 2 hours of interactive sexual harassment training and education. Supervisors will be required to complete sexual harassment training every 2 years thereafter.
2. Providing training to all staff on sexual harassment and the sexual harassment school policy, particularly the procedures for filing complaints and employees' duty to use the school's complaint procedures as outlined in the employee handbook.

3. Publicizing and disseminating the school's sexual harassment policy to staff
4. Ensuring prompt, thorough and fair investigation of complaints
5. Taking timely and appropriate corrective/remedial actions. This may require interim separation of the complainant and the alleged harasser, and subsequent monitoring of developments

All complaints and allegations of sexual harassment shall be kept confidential to the extent necessary to carry out the investigation or take other subsequent necessary action. Any district employee or job applicant who feels that they have been sexually harassed, or who has knowledge of any incident of sexual harassment by or against another employee, a job applicant or a student, shall immediately report the incident to Human Resources, supervisor, the director, or the director's designee. An employee may bypass the supervisor in filing a complaint where the supervisor is the subject of the complaint.

An employee who receives a harassment complaint shall promptly notify Human Resources. Complaints of sexual harassment shall be filed.

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

### Hate Crime Reporting

Hate crimes occur when a perpetrator targets a victim because of their membership in a certain social group, usually defined by racial group, religion, sexual orientation, disability, ethnicity, nationality, age, gender, gender identity, or political affiliation.

Hate crimes will take many forms. Incidents may involve but not limited to physical assault, damage to property, bullying, harassment, verbal abuse or insults, or offensive graffiti or letters.

### Intervention and Reporting

1. Any student or employee who believes that they are a victim of hate-motivated behavior shall immediately contact the appropriate staff, Director or the Director's designee, or if an employee, Human Resources.

2. Staff who are informed of hate-motivated behavior or personally observe such behavior shall notify the Director or the Director's designee, or if regarding another employee, Human Resources. Law enforcement will be notified by the Director or Human Resources if it is determined that a hate-motivated crime occurred.
3. The staff has access to SafeSchools training to recognize hate-motivated behavior and methods of handling such behavior in appropriate ways.

## F. Schoolwide Dress Code

### Prohibition of gang-related apparel

The provisions of any school wide dress code, pursuant to Section 35183, that prohibits pupils from wearing “gang-related apparel,” if the school has adopted that type of a dress code. For those purposes, the comprehensive school safety plan shall define “gang-related apparel.” The definition shall be limited to apparel that, if worn or displayed on a school campus, reasonably could be determined to threaten the health and safety of the school environment. A schoolwide dress code established pursuant to this section and Section 35183 shall be enforced on the school campus and at any school-sponsored activity by the principal of the school or the person designated by the principal. For purposes of this paragraph, “gang-related apparel” shall not be considered a protected form of speech pursuant to Section 48950.

35183.

(a) The Legislature finds and declares each of the following:

(1) The children of this state have the right to an effective public school education. Both students and staff of the primary, elementary, junior and senior high school campuses have the constitutional right to be safe and secure in their persons at school. However, children in many of our public schools are forced to focus on the threat of violence and the messages of violence contained in many aspects of our society, particularly reflected in gang regalia that disrupts the learning environment.

(2) “Gang-related apparel” is hazardous to the health and safety of the school environment.

(3) Instructing teachers and administrators on the subtleties of identifying constantly changing gang regalia and gang affiliation takes an increasing amount of time away from educating our children.

(4) Weapons, including firearms and knives, have become commonplace upon even our elementary school campuses. Students often conceal weapons by wearing clothing, such as jumpsuits and overcoats, and by carrying large bags.

(5) The adoption of a schoolwide uniform policy is a reasonable way to provide some protection for students. A required uniform may protect students from being associated with any particular gang. Moreover, by requiring schoolwide uniforms teachers and

administrators may not need to occupy as much of their time learning the subtleties of gang regalia.

(6) To control the environment in public schools to facilitate and maintain an effective learning environment and to keep the focus of the classroom on learning and not personal safety, schools need the authorization to implement uniform clothing requirements for our public school children.

(7) Many educators believe that school dress significantly influences pupil behavior. This influence is evident on school dress up days and color days. Schools that have adopted school uniforms experience a “coming together feeling,” greater school pride, and better behavior in and out of the classroom.

(b) The governing board of any school district may adopt or rescind a reasonable dress code policy that requires pupils to wear a schoolwide uniform or prohibits pupils from wearing “gang-related apparel” if the governing board of the school district approves a plan that may be initiated by an individual school’s principal, staff, and parents and determines that the policy is necessary for the health and safety of the school environment. Individual schools may include the reasonable dress code policy as part of its school safety plan, pursuant to Section 32281.

(c) Adoption and enforcement of a reasonable dress code policy pursuant to subdivision (b) is not a violation of Section 48950. For purposes of this section, Section 48950 shall apply to elementary, high school, and unified school districts. If a schoolwide uniform is required, the specific uniform selected shall be determined by the principal, staff, and parents of the individual school.

(d) A dress code policy that requires pupils to wear a schoolwide uniform shall not be implemented with less than six months’ notice to parents and the availability of resources to assist economically disadvantaged pupils.

(e) The governing board shall provide a method whereby parents may choose not to have their children comply with an adopted school uniform policy.

(f) If a governing board chooses to adopt a policy pursuant to this section, the policy shall include a provision that no pupil shall be penalized academically or otherwise discriminated against nor denied attendance to school if the pupil’s parents chose not to have the pupil comply with the school uniform policy. The governing board shall continue to have responsibility for the appropriate education of those pupils.

(g) A policy adopted pursuant to this section shall not preclude pupils that participate in a nationally recognized youth organization from wearing organization uniforms on days that the organization has a scheduled meeting.

## G. Procedure for Safe Ingress and Egress of Pupils, Parents, and Staff to and from School (EC 35294.2)

The school shall maintain safe and secure methods of ingress and egress for pupils, parents, and staff to and from the school property, which are ADA compliant. Facilities

shall be inspected regularly by school staff and any necessary modifications shall be made in a timely fashion. Additionally, the school shall maintain a visitor record at both sites to assist in site security. (See Appendix F - Irvine, Technology Office Evacuation Map)

#### Section 4: Human Resources

Human Resources is responsible for providing staff training and ensuring compliance. The following SafeSchools training courses are available to be assigned to designated employees depending upon their level of responsibility for upholding the school Plan and requirements per the law. Training plans may include one or more of the following:

- Active Shooter
- Workplace Violence
- Crisis Response and Recovery
- Family Reunification
- Incident Command Systems
- Managing the Aftermath of Tragedy
- Terrorism: Awareness and Response
- Supervisor's Role in Safety
- Chemical Spills Overview
- Compressed Gas Safety
- Confined Spaces
- Electrical Safety
- Eye and Face Protection
- Facility Emergencies
- Fall Protection
- Fire and Explosion Hazards
- Fire Extinguisher Safety
- General Safety Orientation
- Lead Safety Awareness
- LGBTIQA+
- Office Ergonomics
- Personal Protective Equipment
- Slips, Trips and Falls
- Stormwater Management Overview
- AED (Automated External Defibrillators)
- Bloodborne Pathogen Exposure Prevention
- Cardiopulmonary Resuscitation (CPR)
- First Aid
- Health Emergencies: Asthma Awareness



- Health Emergencies: Choking and Heimlich Maneuver
- Health Emergencies: Life Threatening Allergies
- Health Emergencies: Overview
- Health Emergencies: Seizures
- HIV/AIDS Awareness
- Sexual Harassment: Staff-to-Staff
- Sexual Harassment: Student Issues & Response
- Sexual Misconduct: Staff-to-Student
- Workplace Bullying: Awareness and Prevention
- Cybersecurity Overview
- Email and Messaging Safety
- Arson Awareness and Prevention
- Safety Basics for Security Staff
- School Intruders
- School Violence: Identifying and Addressing
- Visual Weapons Screening
- Online Safety: Cyberbullying
- Online Safety: Predators
- Online Safety: Threats of Violence
- Online Safety: What Every Educator Needs to Know
- Bullying: Recognition and Response
- Child Abuse: Identification & Intervention
- Child Abuse: Mandatory Reporting
- Awareness
- Hazing
- Making Schools Safe for LGBT Students
- Mandated Reporter: Child Abuse and Neglect
- Youth Suicide: Awareness and Prevention
- Evacuation Planning for Students with Special Needs
- Online Safety: Threats of Violence

### Bloodborne Pathogens (BBP)

This policy pertains to spills and cleanup of blood or other body fluids. It is not a first aid/emergency response procedure.

### Treatment of Students

Applicable staff members will be required to complete a BBP course and will be equipped with a first aid kit. Staff will be instructed to prevent exposure to themselves

by utilizing the kits if they must treat a student. Staff must follow the protocol of the site where the cleanup is needed (test site, field trip, etc.). If a cleanup is needed during a Learning Period Meeting, the teacher facilitator will provide the first aid kit to the parent/guardian for their use. All staff must contact their supervisor when an event requiring the use of their first aid kit was needed. First aid kits will be replaced as necessary.

## Procedure

1. In the event of a serious injury resulting in release of blood or other body fluids which could contain pathogens (e.g., HIV or HBV), the first step is to treat the injured party. All applicable staff will have completed the SafeSchools Bloodborne Pathogens course in order to prevent exposure.
2. Spilled body fluids must not be cleaned up without the appropriate protective equipment and materials specifically designated for such fluids. In the case where spilled body fluids need clean-up, this procedure must be followed by all personnel:
  - Advise the most senior employee on duty. They must be aware of the individual(s) doing the actual clean-up and the purpose of the cleanup.
  - Clean up the spilled fluids as follows:
    - Put on protective gloves
    - Spread the absorbent material on the spilled body fluids, (e.g., paper towels) or use the Bloodborne Pathogens Spill kit
    - Neutralize the potential pathogens with a 10% bleach-with-water solution or use the solution provided in the Emergency First Responder Pack. Cover the spill for 15 minutes
    - Use paper towels to pick up material as best possible. Place all potentially contaminated materials in a leak-proof plastic bag.
    - Sweep/mop-up any additional neutralized/absorbed fluids and place in the leak-proof bag
    - Clean sweep/mop materials with hot, soapy water. Lastly, remove gloves from inside-out and place in the bag
    - Secure the bag and discard it as other trash
    - Wash hands thoroughly in hot, soapy water
3. After all activity is completed, an Incident Report is to be completed as necessary and submitted to the Director.

## H. A Safe and Orderly Environment Conducive to Learning at the School Law Enforcement Response

The police will arrive to respond to the emergency. Follow these guidelines:

1. Comply with police instructions. The first responding officer will be focused on stopping the active shooter and creating a safe environment for medical assistance to be brought in to aid the injured.
2. When the police arrive at the location:
  - a. Remain calm and follow officer instructions
  - b. Put down any items in hands
  - c. Immediately raise hands and spread fingers
  - d. Keep hands visible at all times
  - e. Avoid making quick movements toward the officers such as attempting to hold onto them for safety
  - f. Avoid pointing, screaming and/or yelling
  - g. Do not stop to ask officers for help or direction when evacuating, just proceed in the direction from which the officers are entering the area or to an area directed
  - h. Notify any Excel Academy administrator of evacuation from the premises
3. When the police arrive, provide the following information is available and applicable:
  - a. Number of shooters
  - b. Number of individual victims and any hostages
  - c. The type of problem causing the situation
  - d. Type and number of weapons possibly in possession of the shooter
  - e. All necessary Excel Academy administrators still in the area as part of the school's emergency management response
  - f. Identity and description of participants, if possible
  - g. Keys to all involved areas as well as floor plans

### Post-Incident Action

When the police have determined that the active shooter is under control, the emergency operator will provide a public announcement that the emergency is over using a prearranged code (e.g. "All Clear").

### Police Investigation

After the police have secured the premises, the school will arrange to have designated representatives participate in the law enforcement investigation of the incident, including identifying witnesses and providing requested information and documents.

### Medical Assistance

The school will designate representatives who will engage with emergency responders who provide medical assistance to injured employees, including ensuring that all required medical benefits and insurance documentation is provided.

### Notifications of Relatives

The school will designate a school representative to notify relatives of any injured employees in a timely fashion

### OSHA

In the event that there is a fatality or one employee is hospitalized for treatment, OSHA must be notified. If there is a fatality, OSHA must be notified within eight (8) hours. In the event of a hospitalization of one of the employees for treatment, OSHA must be notified within twenty-four (24) hours.

In addition, if the fatality or injury is work-related, the school may have to record the incident within seven (7) calendar days.

To file a report with OSHA, a school representative will call the 24 hour hotline or contact the nearest OSHA office. <https://www.osha.gov/report.html>

Local OSHA California State Plan Offices within the school's service area:

1. Long Beach 562-508-0810
2. Los Angeles 213-576-7451
3. Van Nuys 818-901-5403
4. Santa Ana 714-558-4451

### Media

The school will designate a representative who will respond to any media requests for information. Such representatives will carefully consider the nature of any such requests in order to avoid disclosing information about any person that is considered confidential and protected under Federal and state privacy and medical information laws and regulations and interfering with any ongoing police or internal investigation.

## I. Opioid and Fentanyl Use and Overdose Prevention Procedures

The purpose of this section is to protect the health and well-being of all of our students by having procedures in place to prevent and respond to the use and overdose of opioids and fentanyl.

Excel Academy Charter Schools will use the following prevention strategies:

- Distribute safety advice to families regarding drug use and overdose prevention.
- Regularly assess the school climate and address gaps as needed.
- Providing training to staff who facilitate field trips, school events, and other student in-person events.

### Responding to Possible Overdose

#### STEP 1: EVALUATE FOR SIGNS OF OPIOID OVERDOSE

Signs of overdose, which often results in death if not treated, include:

- Unconsciousness or inability to awaken.
- Slow or shallow breathing or breathing difficulty such as choking sounds or a gurgling/snoring noise from a person who cannot be awakened.
- Fingernails or lips turning blue/purple.

If an opioid overdose is suspected, stimulate the person:

- Call the person's name.
- If the person does not respond, call 911.

#### STEP 2: CALL 911 FOR HELP

An opioid overdose needs immediate medical attention. An essential step is to get someone with medical expertise to see the person as soon as possible. If no emergency medical services (EMS) or other trained personnel is on the scene, call 911 immediately. All you have to say is "Someone is unresponsive and not breathing." Be sure to give a specific address and/or description of your location. After calling 911, follow the dispatcher's instructions.

#### DO'S AND DON'TS WHEN RESPONDING TO OPIOID OVERDOSE

- DO follow the instructions of the 911 dispatcher.
- DO stay with the person and keep the person warm.
- DON'T slap or forcefully try to stimulate the person; it will only cause further injury. If you cannot wake the person, the person may be unconscious.

- DON'T try to make the person vomit drugs that may have been swallowed. Choking or inhaling vomit into the lungs can cause a fatal injury.

## J. Heat Illness Prevention

The purpose of this section is to protect the health and wellbeing of Excel Academy Charter School staff while ever in an outdoor working environment or location; this can include but is not limited to community events, field trips and outdoor learning periods.

Heat illness is described as a serious medical condition resulting from the body's inability to cope with a particular heat load, and includes heat cramps, heat exhaustion, heat syncope, and heat stroke.

The general onset of symptoms can include but is not limited to:

- Heavy sweating
- Painful muscle cramps
- Extreme weakness and/or fatigue
- Nausea and/or vomiting
- Dizziness and/or headache
- Body temperature normal or slightly high
- Fainting
- Pulse fast and weak
- Breathing fast and shallow
- Clammy, pale, cool, and/or moist skin

Best practices to avoid exposure to heat induced illness is to:

- Heed and be mindful of whether information and high heat risk alerts and warnings prior to arriving
- Remain hydrated and bring extra water
- Consider wearing cooling clothing or layering for the ability for cooldown
- Remain aware of areas of shade and comfortable seating
- Take preventative cool-down rest periods
- Report when you are feeling onset of any symptoms listed above

If an employee exhibits signs or reports symptoms of heat illness while taking a preventative cool-down rest or during a preventative cool-down rest period, the

employer shall provide appropriate first aid or emergency response according to his section.

- All employees at the work location can act as designated authorized personnel to call for emergency medical services.

Emergency Response Procedures states the following:

- Emergency Response Procedures. The Employer shall implement effective emergency response procedures including:
  - Ensuring that effective communication by voice, observation, or electronic means is maintained so that employees at the work site can contact a supervisor or emergency medical services when necessary. An electronic device, such as a cell phone or text messaging device, may be used for this purpose only if reception in the area is reliable. If an electronic device will not furnish reliable communication in the work area, the employer will ensure a means of summoning emergency medical services.
  - Responding to signs and symptoms of possible heat illness, including but not limited to first aid measures and how emergency medical services will be provided.
    - If a supervisor observes, or any employee reports, any signs or symptoms of heat illness in any employee, the supervisor shall take immediate action commensurate with the severity of the illness.
    - If the signs or symptoms are indicators of severe heat illness (such as, but not limited to, decreased level of consciousness, staggering, vomiting, disorientation, irrational behavior or convulsions), the employer must implement emergency response procedures.
    - An employee exhibiting signs or symptoms of heat illness shall be monitored and shall not be left alone or sent home without being offered onsite first aid and/or being provided with emergency medical services in accordance with the employer's procedures.
  - Contacting emergency medical services and, if necessary, transporting employees to a place where they can be reached by an emergency medical provider.
  - Ensuring that, in the event of an emergency, clear and precise directions to the work site can and will be provided as needed to emergency responders.



## Workplace Violence Prevention (WVP)

Excel Academy Charter School's Workplace Violence Prevention Plan is designed to proactively address, educate, and equip EACS staff with the necessary resources to manage situations involving workplace violence. Our commitment is to foster a safe environment by strictly prohibiting employee retaliation, rigorously assessing potential workplace hazards, and clearly communicating comprehensive strategies for reporting, responding to, and managing incidents of workplace violence.

### Identifying Workplace Violence

#### **What Is Workplace Violence?**

Per Labor Code section 6401.9, "workplace violence" is defined as any act of violence or threat of violence that occurs in a place of employment. This includes, but is not limited to, the following:

- The threat or use of physical force against an employee that results in, or has a high likelihood of resulting in, injury, psychological trauma, or stress, regardless of whether the employee sustains an injury.
- An incident involving a threat or use of a firearm or other dangerous weapon, including the use of common objects as weapons, regardless of whether the employee sustains an injury.
- The four types of workplace violence defined in Labor Code section 6401.9.

Note: "Workplace violence" does not include lawful acts of self-defense or defense of others.

Examples: physical assault, verbal threat, written statement, including texts, electronic messages, social media messages, or other online posts.

### Types of Workplace Violence?

#### **Type 1 Violence: Criminal Intent**

Workplace violence committed by a person who has no legitimate business at the worksite. Includes violent acts by anyone who enters the workplace or approaches workers with the intent to commit a crime.

Example: Active Shooters

### **Type 2 Violence: Customer/Client Workplace**

Violence directed at employees by customers, clients, patients, students, inmates, or visitors.

Example: Customer becomes violent while being served by the business.

### **Type 3 Violence: Worker-On-Worker**

Workplace violence against an employee by a present or former employee, supervisor, or manager.

Examples: Employee becomes physically aggressive with supervisor. Employee brings a gun to work.

### **Type 4 Violence: Personal Relationship**

Workplace violence committed in the workplace by a person who does not work there but has or is known to have had a personal relationship with an employee

Example: Violence by employee's spouse or domestic partner

### Accepting and responding to reports of workplace violence

It is imperative that any threats of workplace violence are reported to the Workplace Violence Committee without delay. Employees have multiple reporting options available to them, including email, anonymous Google form, or by phone. The anonymity provided by the form is designed to protect employees from any possible retaliation.

Committee members who are present on-site must stay vigilant and attentive to any communications from the property management company that may pertain to potential threats to either the building or its vicinity. Should there be an immediate threat or danger, it will be addressed in accordance with the procedures established in the mandatory training or as detailed in the workplace violence response plan.

### Employee workplace violence training and communication

The staff of Excel Academy Charter School will be tasked with the annual obligation to undertake training, which will be delivered through a combination of training videos, quizzes, and questionnaires. It is the responsibility of the staff to thoroughly review the emergency response plan on an annual basis and provide their signature to confirm their understanding and agreement to comply with the outlined procedures.

Employees can anticipate receiving annual training, as well as being invited to contribute to the development and implementation processes through regular quick surveys and assessments on workplace violence.

#### Workplace violence hazard assessments

Both on-site and off-site committees are tasked with carrying out monthly hazard assessments. These assessments are comprehensive, including, but not limited to, perimeter checks, building inspections, maintenance reviews, staff inventories, and briefings on recent workplace conflicts. Committee members are required to review and discuss any recent reports, instances, or suspicions of threatening behavior. Additionally, members from both on-site and off-site committees are obligated to maintain and complete a monthly safety and compliance log, ensuring all aspects of the workplace environment are continuously monitored and evaluated for safety and compliance.

#### Onsite Committee Chair:

Anne Ceasrio

Office Manager

[acesario@excelacademy.education](mailto:acesario@excelacademy.education)

#### Offsite Committee Chair:

Megan Anderson

Director of Human Resources

[manderson@excelacademy.education](mailto:manderson@excelacademy.education)

Plan details and examples of potential exposure to liability will be thoroughly documented and collected through the completion of workplace violence surveys. These surveys will be mandatory for all staff, whether working on-site or off-site, and will play a crucial role in assisting workplace safety committees in effectively assessing and mitigating risks and dangers in the workplace.

#### Handling and Reporting Workplace Violence Reports

The Excel Academy Charter School Committee members will be responsible for reviewing all potential and submitted reports of workplace violence. The Chair will be responsible for intercepting and reviewing all potential and submitted reports of workplace hazards and potential violence and assess procedural awareness for all staff members. The Chair will assess the severity and nature of the claim and take immediate action for the safety of on-site team members. All submissions will remain anonymous

and no adverse action or retaliation can be held toward any staff bringing forth potential hazard. Excel Academy Charter School reserves the right to investigate all claims and ensures the right in reporting against retaliation.

### Employee Compliance

All staff at Excel Academy Charter School are mandated to undergo annual workplace violence training. This comprehensive training encompasses a series of educational videos followed by a quiz and a questionnaire. Upon successful completion, staff members are required to submit a confirmation receipt, which will be filed in their employment records annually. This training is integral to our annual mandatory training requirements. Please be advised that non-compliance or failure to participate in this training may lead to disciplinary measures, including the possibility of termination of the employment contract.

### Staff Communication

Depending on the severity and urgency of the claim, the Chair will utilize suitable communication methods to promptly advise and inform all relevant staff members. In the case of a severe and immediate threat, an evacuation of the location or implementation of a lockdown procedure will be initiated. Communication channels such as phone calls, text messages, and emails will be employed based on the severity and nature of the potential threat.

### Emergency Response

In the event of an immediate and severe threat, on-site staff are directed to promptly contact emergency services by dialing 9-1-1 and to initiate lockdown procedures without delay.

Should there be a severe but non-immediate threat, providing on-site staff with sufficient time to react, they may be instructed to evacuate the premises. Evacuation routes and procedures are detailed in the Appendix of the Injury and Illness Prevention Program (IIPP). Alternatively, staff may be advised to proceed with their daily work activities from a secure remote location, ensuring their safety while maintaining operational continuity.

### Procedure to Identify

Included in annual processes all staff will be asked to complete a workplace violence survey. We will gain the insight of our staff to target and expose potential threats. Each

year the committee and chair will review the submission data from staff surveys and develop response policies in relation to violent scenarios.

On-Site Safety checks will be completed on a monthly basis by onsite committee members and reviewed by the committee chair. Adjustments and revisions will be made monthly as needed in response to safety checks. On-site committee members will use workplace violence safety checklists and log to compete and monitor monthly safety environments. This plan along with annual training and safety checks will begin June 1, 2024.

Whenever a new hazard is identified, prompt procedures should be in place to correct workplace violence hazards that have been evaluated. Following an incident, there should be clear procedures for response and investigation. To ensure ongoing safety, the plan should be reviewed annually and whenever a deficiency is observed or becomes apparent.

### Incident Report

In the case of workplace violence, a comprehensive report must be meticulously prepared and subsequently reviewed by the Committee Chair. The report should encompass the following critical elements:

- The date, time, and specific location of the incident.
- The classification of workplace violence, categorized as Type 1, 2, 3, and/or 4.
- An exhaustive description of the incident.
- Identification of the perpetrator(s) involved in the violence.
- The circumstances prevailing at the time of the incident.
- The exact location within the workplace where the incident unfolded.
- Detailed characteristics of the incident, including but not limited to physical attacks, involvement of weapons, threats, sexual assault, incidents involving animals, or other relevant events.
- The aftermath of the incident, specifically mentioning any engagement with law enforcement agencies.
- The measures implemented to safeguard employees from future threats or hazards.
- The details of the individual who documented the incident, including their name, job title, and the date on which the report was finalized.

It is imperative to note that employers are required to omit any personal identifying information that could potentially reveal the identity of any individual involved in a violent incident.

**\*\*Training Employees on Workplace Violence:\*\***

Employers bear the responsibility of providing effective training on workplace violence. It is essential that the training materials are comprehensible, tailored to align with the employees' levels of education, reading proficiency, and language. This ensures that all employees are adequately informed and prepared to handle situations involving workplace violence.

**Incident Follow Up**

After violent incidents occur, the Committee Chair will implement procedures to timely correct workplace violence hazards that have been identified and evaluated. These procedures include a plan for post-incident response and investigation to prevent future incidents from occurring. Additionally, these procedures will be reviewed on an annual basis, as well as when a deficiency is observed or becomes apparent, and especially after a workplace violence incident.

Necessary procedures for employee health and safety as required by the Division and Standards Board are incorporated into the workplace violence prevention plan. This plan is in effect at all times and in all work areas, and is specific to the hazards and corrective measures for each work area and operation. The written plan is included as a stand-alone section in the written injury and illness prevention program required by the Division and Standards Board.

**Requirements of labor Code 6401.9.**

**Applicable Regulations Can Be Found in the California Code of Regulations (CCR), Title 8 Sections Listed Below:**

[California Senate Bill 553](#) text: *Occupational safety: workplace violence: restraining orders and workplace violence prevention plan.*

Requirements for every employer to establish, implement, and maintain a written [Injury and Illness Prevention Program \(IIPP\): California Code of Regulations, title 8, Section 3203](#)

Requirements for workplace violence prevention in Health Care: [California Code of Regulations, title 8, Section 3342 \(Violence Prevention in Health Care\)](#)

Requirements of reporting serious injuries/illnesses and fatalities as a result of workplace violence as required by 342: [California Code of Regulations, title 8, section 342](#)

Requirement for employers to record work-related fatalities, injuries, and illnesses: [California Code of Regulations, title 8, section 14300 \(Employer Records-Log 300\)](#)



# Appendices

## Appendix A: Emergency Contact Information in Paycom

1. Login into the Employee Portal in Paycom
2. Click “Information”
3. Under Address and Contact Information, enter Emergency Contact Information and click “Update”




Time Management   Time-Off Requests   **Information**   Payroll   Documents   Checklists   Company Information   Learning

### Address and Contact Information

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#### Emergency Contacts

Emergency Contact 1	Emergency Contact 2
Emergency Phone Number * 	Emergency Phone Number
Emergency Contact Name * 	Emergency Contact Name
Relationship to the Employee * 	Relationship to the Employee

#### Emergency Contact 3

Emergency Phone Number

Emergency Contact Name

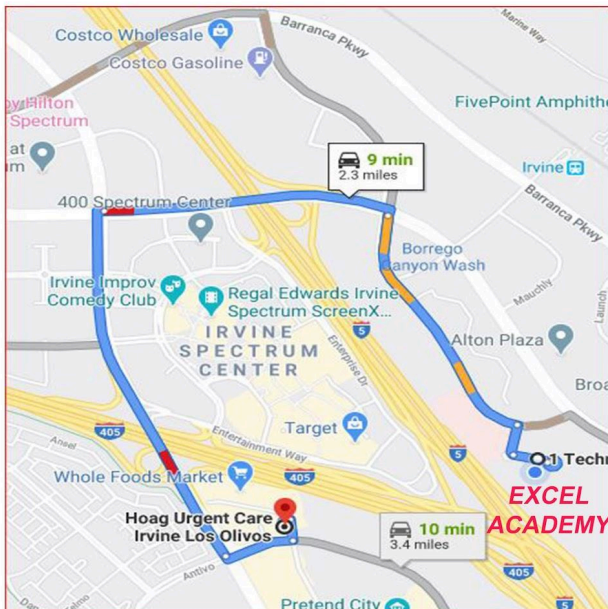
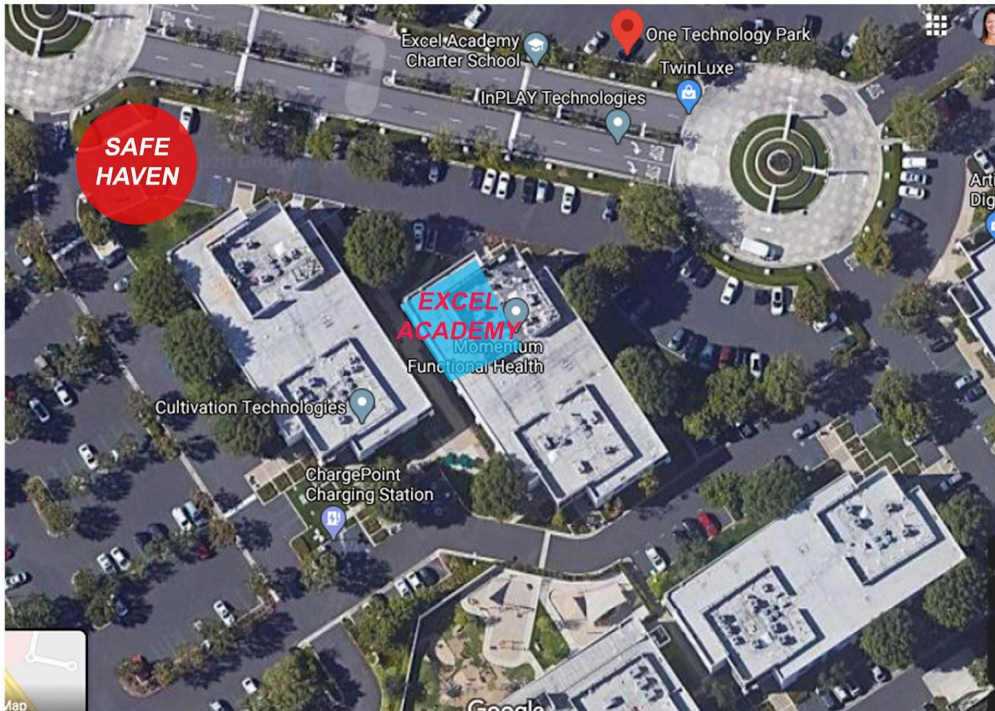
Relationship to the Employee

### **Appendix B: Irvine Executive Office Evacuation Map**

In any hostile situation every individual should try to remain calm. If it becomes necessary to evacuate the Excel Academy office, exit the building safely and make your way to the safe haven (parking lot area in front of building J-see aerial map) as quickly as possible. Staff will gather on the lawn in front of the building. Call 911 as soon as you are clear of any danger (natural or otherwise).

If trapped inside the building, lock the main/front doors if possible and retreat to one of the interior offices together. Lock that door, barricade it with any heavy objects, turn off the lights, silence all cell phones and call 911.

**IN CASE OF EVACUATION DUE TO FIRE, NATURAL DISASTER OR OTHER-  
ALL EMPLOYEES AND GUESTS PLEASE MEET AT SAFE HAVEN AREA  
INDICATED ON THIS MAP.**



**Phone number for Hoag Urgent Care  
949-557-0600  
Hours: 8am-8pm (M-F)  
8am-5pm (Sat/Sun)**

### **Hostage situation in main lobby (Building I):**

If a hostage is held against their will in the lobby, the other employees in the private interior offices must close and lock their doors immediately, barricade their door with one of the large desks and call 911 immediately.

### **Hostage situation in one of the private interior offices:**

If a parent or visitor is able to hold one of the employees hostage in their own private office, any employee who is able must evacuate quickly through the main office door, and get to the Safe Haven (South East end of parking lot - see map) and immediately call 911. Staff will gather on the lawn in front of the building.

If the other employees are unable to escape out the front door, they must close and lock their private, interior doors immediately, barricade their door, turn out the lights, silence their phones/pagers, and call 911.

### **Natural Disasters:**

In southern California, the most likely natural disaster is an earthquake. In the event that an earthquake occurs at the Main Office, the following actions shall be taken:

1. Individuals must implement the Drop, Cover, and Hold action. Each individual must:
  - **Drop** to the ground. For those individuals who are physically unable to drop to the ground, they must remain seated and cover their heads with their arms and hands
  - **Cover** under or near desks, tables, or chairs in a kneeling position with their backs to the windows
  - **Hold** on to table or chair legs
  - Remain in the drop position until ground movement ends
2. Assess the situation
  - Severe structural damage
  - Fire
  - Toxic spill
  - Injuries (Render first aid if necessary)
3. Evacuate the room if necessary
4. For additional emergency treatment, call 911 immediately.

**Concentra Urgent Care Address: 15751 Rockfield Blvd.** (see map)

Please report any office or building damage to the Office Manager.

**Appendix C: Child Abuse Report Form**

**Print**

**SUSPECTED CHILD ABUSE REPORT**

**Reset Form**

To Be Completed by Mandated Child Abuse Reporters Pursuant to Penal Code Section 11166

CASE NAME: \_\_\_\_\_

PLEASE PRINT OR TYPE

CASE NUMBER: \_\_\_\_\_

<b>A. REPORTING PARTY</b>	NAME OF MANDATED REPORTER		TITLE		MANDATED REPORTER CATEGORY		
	REPORTER'S BUSINESS/AGENCY NAME AND ADDRESS				Street	City	Zip
	REPORTER'S TELEPHONE (DAYTIME)		SIGNATURE		DID MANDATED REPORTER WITNESS THE INCIDENT?		
<b>B. REPORT NOTIFICATION</b>	<input type="checkbox"/> LAW ENFORCEMENT <input type="checkbox"/> COUNTY PROBATION		AGENCY				
	<input type="checkbox"/> COUNTY WELFARE / CPS (Child Protective Services)		ADDRESS				
	ADDRESS		Street	City	Zip	DATE/TIME OF PHONE CALL	
<b>C. VICTIM</b> One report per victim	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY
	ADDRESS				Street	City	Zip
	PRESENT LOCATION OF VICTIM				SCHOOL	CLASS	GRADE
	PHYSICALLY DISABLED? <input type="checkbox"/> YES <input type="checkbox"/> NO	DEVELOPMENTALLY DISABLED? <input type="checkbox"/> YES <input type="checkbox"/> NO	OTHER DISABILITY (SPECIFY)		PRIMARY LANGUAGE SPOKEN IN HOME		
	IN FOSTER CARE? <input type="checkbox"/> YES <input type="checkbox"/> NO	IF VICTIM WAS IN OUT-OF-HOME CARE AT TIME OF INCIDENT, CHECK TYPE OF CARE: <input type="checkbox"/> DAY CARE <input type="checkbox"/> CHILD CARE CENTER <input type="checkbox"/> FOSTER FAMILY HOME <input type="checkbox"/> FAMILY FRIEND <input type="checkbox"/> GROUP HOME OR INSTITUTION <input type="checkbox"/> RELATIVE'S HOME			TYPE OF ABUSE (CHECK ONE OR MORE) <input type="checkbox"/> PHYSICAL <input type="checkbox"/> MENTAL <input type="checkbox"/> SEXUAL <input type="checkbox"/> NEGLECT <input type="checkbox"/> OTHER (SPECIFY)		
	RELATIONSHIP TO SUSPECT				PHOTOS TAKEN? <input type="checkbox"/> YES <input type="checkbox"/> NO	DID THE INCIDENT RESULT IN THIS VICTIM'S DEATH? <input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> UNK	
<b>D. INVOLVED PARTIES</b>	<b>VICTIM'S SIBLINGS</b>						
	1. NAME		BIRTHDATE	SEX	ETHNICITY	NAME	
	2. _____		_____	_____	_____	3. _____	
	4. _____						
	<b>VICTIM'S PARENTS/GUARDIANS</b>						
	NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY
ADDRESS				Street	City	Zip	
HOME PHONE		BUSINESS PHONE					
( )		( )					
<b>SUSPECT</b>							
SUSPECT'S NAME (LAST, FIRST, MIDDLE)				BIRTHDATE OR APPROX. AGE	SEX	ETHNICITY	
ADDRESS				Street	City	Zip	
HOME PHONE		BUSINESS PHONE					
( )		( )					
<b>OTHER RELEVANT INFORMATION</b>							
OTHER RELEVANT INFORMATION							
<b>E. INCIDENT INFORMATION</b>	IF NECESSARY, ATTACH EXTRA SHEET(S) OR OTHER FORM(S) AND CHECK THIS BOX <input type="checkbox"/> IF MULTIPLE VICTIMS, INDICATE NUMBER: _____						
	DATE / TIME OF INCIDENT			PLACE OF INCIDENT			
	NARRATIVE DESCRIPTION (What victim(s) said/what the mandated reporter observed/what person accompanying the victim(s) said/similar or past incidents involving the victim(s) or suspect)						

SS 8572 (Rev. 12/02)

**DEFINITIONS AND INSTRUCTIONS ON REVERSE**

**DO NOT** submit a copy of this form to the Department of Justice (DOJ). The investigating agency is required under Penal Code Section 11169 to submit to DOJ a Child Abuse Investigation Report Form SS 8583 if (1) an active investigation was conducted and (2) the incident was determined not to be unfounded.

WHITE COPY-Police or Sheriff's Department; BLUE COPY-County Welfare or Probation Department; GREEN COPY-District Attorney's Office; YELLOW COPY-Reporting Party



**DEFINITIONS AND GENERAL INSTRUCTIONS FOR COMPLETION OF FORM SS 8572**

All Penal Code (PC) references are located in Article 2.5 of the PC. This article is known as the Child Abuse and Neglect Reporting Act (CANRA). The provisions of CANRA may be viewed at: <http://www.leginfo.ca.gov/calaw.html> (specify "Penal Code" and search for Sections 11164-11174.3). A mandated reporter must complete and submit the form SS 8572 even if some of the requested information is not known. (PC Section 11167(a).)

**I. MANDATED CHILD ABUSE REPORTERS**

- Mandated child abuse reporters include all those individuals and entities listed in PC Section 11165.7.

**II. TO WHOM REPORTS ARE TO BE MADE ("DESIGNATED AGENCIES")**

- Reports of suspected child abuse or neglect shall be made by mandated reporters to any police department or sheriff's department (not including a school district police or security department), the county probation department (if designated by the county to receive mandated reports), or the county welfare department. (PC Section 11165.9.)

**III. REPORTING RESPONSIBILITIES**

- Any mandated reporter who has knowledge of or observes a child, in his or her professional capacity or within the scope of his or her employment, whom he or she knows or reasonably suspects has been the victim of child abuse or neglect shall report such suspected incident of abuse or neglect to a designated agency immediately or as soon as practically possible by telephone and shall prepare and send a written report thereof *within 36 hours* of receiving the information concerning the incident. (PC Section 11166(a).)
- No mandated reporter who reports a suspected incident of child abuse or neglect shall be held civilly or criminally liable for any report required or authorized by CANRA. Any other person reporting a known or suspected incident of child abuse or neglect shall not incur civil or criminal liability as a result of any report authorized by CANRA unless it can be proven the report was false and the person knew it was false or made the report with reckless disregard of its truth or falsity. (PC Section 11172(a).)

**IV. INSTRUCTIONS**

- **SECTION A - REPORTING PARTY:** Enter the mandated reporter's name, title, category (from PC Section 11165.7), business/agency name and address, daytime telephone number, and today's date. Check yes-no whether the mandated reporter witnessed the incident. The signature area is for either the mandated reporter or, if the report is telephoned in by the mandated reporter, the person taking the telephoned report.

**IV. INSTRUCTIONS (Continued)**

- **SECTION B - REPORT NOTIFICATION:** Complete the name and address of the designated agency notified, the date/time of the phone call, and the name, title, and telephone number of the official contacted.
- **SECTION C - VICTIM (One Report per Victim):** Enter the victim's name, address, telephone number, birth date or approximate age, sex, ethnicity, present location, and, where applicable, enter the school, class (indicate the teacher's name or room number), and grade. List the primary language spoken in the victim's home. Check the appropriate yes-no box to indicate whether the victim may have a developmental disability or physical disability and specify any other apparent disability. Check the appropriate yes-no box to indicate whether the victim is in foster care, and check the appropriate box to indicate the type of care if the victim was in out-of-home care. Check the appropriate box to indicate the type of abuse. List the victim's relationship to the suspect. Check the appropriate yes-no box to indicate whether photos of the injuries were taken. Check the appropriate box to indicate whether the incident resulted in the victim's death.
- **SECTION D - INVOLVED PARTIES:** Enter the requested information for: Victim's Siblings, Victim's Parents/Guardians, and Suspect. Attach extra sheet(s) if needed (provide the requested information for each individual on the attached sheet(s)).
- **SECTION E - INCIDENT INFORMATION:** If multiple victims, indicate the number and submit a form for each victim. Enter date/time and place of the incident. Provide a narrative of the incident. Attach extra sheet(s) if needed.

**V. DISTRIBUTION**

- **Reporting Party:** After completing Form SS 8572, retain the yellow copy for your records and submit the top three copies to the designated agency.
- **Designated Agency:** *Within 36 hours* of receipt of Form SS 8572, send **white copy** to police or sheriff's department, **blue copy** to county welfare or probation department, and **green copy** to district attorney's office.

**ETHNICITY CODES**

1 Alaskan Native	6 Caribbean	11 Guamanian	16 Korean	22 Polynesian	27 White-Armenian
2 American Indian	7 Central American	12 Hawaiian	17 Laotian	23 Samoan	28 White-Central American
3 Asian Indian	8 Chinese	13 Hispanic	18 Mexican	24 South American	29 White-European
4 Black	9 Ethiopian	14 Hmong	19 Other Asian	25 Vietnamese	30 White-Middle Eastern
5 Cambodian	10 Filipino	15 Japanese	21 Other Pacific Islander	26 White	31 White-Romanian

## **Appendix D: Excerpt from EACS Employee Handbook: “Section I: Nondiscrimination Policies”**

### **A. Equal Employment Opportunity**

The School is an equal opportunity employer and makes employment decisions on the basis of merit. We strive to have the most highly qualified people in every position. School policy prohibits unlawful discrimination based on actual or perceived race, color, creed, actual or perceived gender (including gender identity and gender expression), religion (all aspects of religious beliefs, observance or practice, including religious dress or grooming practices), marital status, registered domestic partner status, status as a victim of domestic violence, assault or stalking, age, ethnicity, national origin or ancestry, citizenship, physical or mental disability, medical condition (including cancer or a record or history of cancer, and genetic characteristics), sex (including pregnancy, childbirth, breastfeeding or a related medical condition), genetic information, sexual orientation, political affiliation, military and veteran status or any other consideration made unlawful by federal, state, or local laws. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics. Discrimination will also include failing to reasonably accommodate religious practices or qualified individuals with disabilities where the accommodation does not pose an undue hardship.

The School’s management is responsible for adherence to this policy. But in the final analysis, attainment of The School’s goal of equal employment opportunity and enrichment through diversity depends on the commitment and good faith effort of all of you.

The School will comply with all applicable equal employment and discrimination laws, including Title IX, the California Fair Employment and Housing Act, the Americans with Disabilities Act, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination in Employment Act, and all other applicable laws.

Additionally, Title IX prohibits discrimination on the basis of sex in education programs or activities by recipients of federal financial assistance. The School does not discriminate on the basis of sex in the educational program or activity which it operates, including employment in such programs and activities.



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

Ms. Megan Anderson, Assistant Director of Human Resources  
Title IX/Uniform Complaint Procedure Coordinator  
(714) 336-4220  
manderson@excelacademy.education  
1 Technology Dr, Ste I-811

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

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

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

## B. Disability Accommodation

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

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

in an interactive process with the employee to identify possible accommodations, if any, which will help the applicant or employee perform the job. An applicant or employee who requires accommodation due to a religious belief or practice (including religious dress and grooming practices, such as religious clothing or hairstyles) must also contact the HR department and discuss the need for accommodation. If the accommodation is reasonable and will not impose an undue hardship, the School will work to make the accommodation.

### C. Anti-Harassment

The School is committed to providing a work environment free of harassment and abusive conduct as that term may be defined by statute or regulation then in effect at the time of the conduct. School policy prohibits conduct that is disrespectful, unprofessional as well as harassment based on actual or perceived race, color, creed, actual or perceived gender (including gender identity and gender expression), religion (all aspects of religious beliefs, observance or practice, including religious dress or grooming practices), marital status, registered domestic partner status, status as a victim of domestic violence, assault or stalking, age, ethnicity, national origin or ancestry, citizenship, physical or mental disability, medical condition (including cancer or a record or history of cancer, and genetic characteristics), sex (including pregnancy, childbirth, breastfeeding or a related medical condition), genetic information, sexual orientation, political affiliation, military and veteran status or any other basis protected by federal, state or local law or ordinance or regulation. All such conduct violates school policy. The School's anti-harassment policy applies to all persons involved in the operation of the School and prohibits harassment, disrespectful or unprofessional conduct by any employee of the School, including supervisors and managers, as well as vendors, customers, independent contractors and any other persons. It also prohibits harassment, disrespectful or unprofessional conduct based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.

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

- Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations or comments;
- Visual displays such as derogatory and/or sexually-oriented posters, photography, cartoons, drawings or gestures;

- Physical conduct including assault, unwanted touching, intentionally blocking normal movement or interfering with work because of sex, race or any other protected basis;
- Threats and demands to submit to sexual requests as a condition of continued employment, or to avoid some other loss and offers of employment benefits in return for sexual favors;
- Retaliation for reporting or threatening to report harassment; and
- Communication via electronic media of any type that includes any conduct that is prohibited by state and/or federal law, or by company policy.
- Sexual harassment does not need to be motivated by sexual desire to be unlawful or to violate this policy. For example, hostile acts toward an employee because of their gender will amount to sexual harassment, regardless of whether the treatment is motivated by any sexual desire.

The School is committed to compliance with all applicable laws providing equal employment opportunities and is dedicated to ensuring a culture free of harassment. This commitment applies to all persons involved in School operations and prohibits unlawful discrimination by any employee of the School, including supervisors and coworkers as well as prohibiting harassment and prohibited conduct.

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

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

An employee who believes they have been harassed, discriminated against or retaliated against may initiate the reporting process by contacting their supervisor, or, if appropriate, the next level of management (see Reporting procedure, which follows). You may at any time contact your HR department. All discrimination, harassment and retaliation complaints will be promptly investigated and will be treated confidentially to the extent possible and appropriate action taken where warranted. Complaints made in good faith will in no way be held against the employee.

### Sexual Harassment

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

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

(1) Submission to the conduct is explicitly or implicitly made a term or a condition of an individual's academic status, employment, or progress.

(2) Submission to, or rejection of, the conduct by the individual is used as the basis of academic or employment decisions affecting the individual.

(3) The conduct has the purpose or effect of having a negative impact upon the individual's academic performance, work, or progress or has the purpose or effect of creating an intimidating, hostile, or offensive educational or working environment. The conduct is sufficiently severe, persistent, pervasive or objectively offensive, so as to create a hostile or abusive educational or working environment or to limit the individual's ability to participate in or benefit from an education program or activity.

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

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

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

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

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

(1) The campus or school grounds of the local agency.

(2) Properties controlled or owned by the local agency.

(3) Off-campus, if such activity is sponsored by the local agency, or is conducted by organizations sponsored by or under the jurisdiction of the local agency.

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

Any employee who engages or participates in sexual harassment, or who aids, abets, incites, compels or coerces another to commit sexual harassment or retaliates against another individual is in violation of this policy and subject to disciplinary action up to and including dismissal. Leads, managers and supervisors are to ensure that no such intimidation or harmful atmosphere of unwelcome sexual overtones exist in their workplaces. Every effort must be made to sensitize themselves and their employees to the differences between purely social overtones and those intended to affect working conditions. Also, employees are responsible for respecting the rights of their co-workers. Any employee who feels they have been harassed or retaliated against, or has knowledge of any incident of harassment or retaliation on any protected basis shall immediately report such incidents to their immediate supervisor, Human Resources, the CEO or Title IX Coordinator and Coordinator for Nondiscrimination in Employment. If the supervisor is the harasser or has not responded to the complaint, or if not an employee, then the complainer must complain to any administrator without fear of reprisal. Employees may also report instances of sexual harassment through the School's Uniform Complaint Procedure without fear of reprisal.

## Reporting

The School has an affirmative duty to take reasonable steps to prevent and correct discrimination and harassment. Supervisors, co-workers, and third parties are prohibited from engaging in unlawful behavior under the Fair Employment and Housing Act or any other applicable law. Protected groups under the law include the following:

- Age (40 and over)
- Ancestry
- Color
- Religious Creed (including religious dress and grooming practices)
- Denial of Family and Medical Care Leave
- Disability (mental and physical) including HIV and AIDS
- Marital Status
- Medical Condition (cancer and genetic characteristics)
- Genetic Information

- Military and Veteran Status
- National Origin (including language use restrictions)
- Race
- Sex (which includes pregnancy, childbirth, breastfeeding and medical conditions related to pregnancy, childbirth or breastfeeding)
- Gender, Gender Identity, and Gender Expression
- Sexual Orientation

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

#### Investigation/Complaint Procedure

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

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

#### Informal Procedure

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

### Formal Procedure

As noted above, individuals who believe they have been the victims of conduct prohibited by this policy statement or believe they have witnessed such conduct must discuss their concerns with their supervisor or the HR department. The School encourages the prompt reporting of complaints or concerns so that rapid and constructive action will be taken before relationships become irreparably strained. Therefore, while no fixed reporting period has been established, early reporting and intervention have proven to be the most effective method of resolving actual or perceived incidents of harassment. Any reported allegations of harassment, discrimination or retaliation will be investigated promptly. The investigation may include individual interviews with the parties involved and, where necessary, with individuals who may have observed the alleged conduct or may have other relevant knowledge. Confidentiality will be maintained throughout the investigation process to the extent consistent with adequate investigation and appropriate corrective action. Misconduct constituting harassment, discrimination or retaliation will be dealt with appropriately. Responsive action may include, training, referral to counseling and/or disciplinary action such as warning, reprimand, withholding of a promotion or pay increase, reassignment, temporary suspension without pay or termination, as the School believes appropriate under the circumstances. If a party to a complaint does not agree with its resolution, that party may appeal to the CEO.



## Retaliation

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

## Conclusion

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

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

## Appendix E: Civility Policy

School personnel, parents, 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 with the goal of providing a safe and harassment free environment for the students and staff while maintaining individual rights to freedom of expression.

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

- using an inappropriately loud voice;
- using profane, vulgar, or obscene words or gestures;
- belittling, jeering, or taunting;
- using personal epithets;
- using violent or aggressive gestures or body-language;
- repeatedly and inappropriately interrupting another speaker;
- repeatedly demanding personal attention at inappropriate times;
- purposefully and inappropriately invading personal space;
- purposefully ignoring appropriate communications;
- wrongfully interfering with another person's freedom of movement;
- wrongfully invading another person's private possessions; or;
- 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 they responded.
4. **Determination** - If it is determined that uncivil behavior occurred, proper disciplinary action will be taken, which may include suspension or expulsion.

## **Appendix F: Excerpt from the EACS Employee Handbook: “Section III: Standards of Conduct”**

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

### **A. Freedom from Violence**

The School is concerned about violence in society. The School expressly prohibits any acts or threats of violence by any School employee or former employee against any other employee. The School will also not condone any acts or threats of violence against school employees or customers while engaged in business with or on behalf of the School.

The School has developed guidelines to help maintain a secure workplace. It is important to be aware of persons loitering for no apparent reason in parking areas, walkways, entrances and exits, and service areas. Report any suspicious persons or activities to the Executive Director or their designee. Secure the desk or office at the end of the day. When called away from the work area for an extended length of time, do not leave valuable and/or personal articles in or around the workstation that may be accessible. The security of facilities as well as the welfare of the employees depends upon the alertness and sensitivity of every individual to potential security risks.

The employee must immediately notify the Executive Director or designee when other employees or outsiders express anger and make threats against the School or behave in a manner suggesting the possibility of violent activity.

All threats or perceived threats of violence against any person or property are considered serious. Staff who are alerted to or observe any threat or perceived threat shall immediately report the threat or perceived threat to law enforcement. The School will support the local law enforcement in the immediate investigation and threat assessment, as needed. The very act of a threat shall be cause for discipline against a student or staff member and immediate removal of a visitor.

In keeping with the spirit and intent of this policy, and to ensure that the School’s objective in this regard is attained, it is the commitment of the School:

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

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

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

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

In furtherance of this policy, employees have a "duty to warn" their supervisors or human resources representative of any suspicious workplace activity or situations or incidents that they observe or that they are aware of that involve other employees, former employees, customers, or visitors and that appear problematic. This includes, for example, threats or acts of violence, aggressive behavior, offensive acts, discussion of bringing weapons into the workplace, threatening or offensive comments or remarks, and the like. Employee reports made pursuant to this policy will be held in confidence to the maximum possible extent. The School will not condone any form of retaliation against any employee for making a report under this policy.

## **B. Prohibited Conduct**

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

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

- Falsifying employment records, employment information, or other School records;
- Inefficient or careless performance of job responsibilities or inability to perform job duties satisfactorily;
- Recording the work time of another employee or allowing any other employee to record another employee's work time, or falsifying any time card, either one's own or another employee's;
- Theft and deliberate or careless damage or destruction of any School property, or the property of any employee or customer;
- Removing or borrowing School property without prior authorization;
- Unauthorized use or misuse of School equipment, time, materials, or facilities;
- Provoking a fight or fighting during working hours or on School property;
- Participating in horseplay or practical jokes on School time or on School premises;
- Carrying firearms or any other dangerous weapons on School premises at any time;
- Engaging in criminal conduct whether or not related to job performance;
- Causing, creating, or participating in a disruption of any kind during working hours on School property;
- Insubordination, including but not limited to failure or refusal to obey the orders or instructions of a supervisor or member of management, or the use of abusive or threatening language toward a colleague;
- Using abusive, threatening or intimidating language at any time on School premises;
- Failing to notify a supervisor when unable to report to work;
- Unreported absence of three (3) days;
- Failing to obtain permission to leave work for any reason during normal working hours;
- Failing to observe working schedules, including rest and lunch periods;
- Failing to provide a physician's certificate when requested or required to do so;
- Sleeping or malingering on the job;
- Making or accepting personal telephone calls, including cell phone calls, of more than three minutes in duration during working hours, except in cases of emergency or extreme circumstances;
- Working overtime without authorization or refusing to work assigned overtime;
- Violation of dress standards;

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

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

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

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

The following forms of touching are never appropriate:

- Inappropriate or lengthy embraces
- Kisses on the mouth
- Corporal punishment
- Sitting student on one's lap (grades 3-8)
- Touching buttocks, chests or genital areas
- Pushing a person or another person's body part (other than in self-defense, defense of another, or property)
- Showing affection in isolated areas
- Wrestling with students or other staff members
- Bench-pressing another person
- Tickling
- Piggyback rides
- Massages
- Any form of unwanted affection
- Any form of sexual contact
- Poking fingers at another person that results in an offensive contact

This policy does not prevent appropriate forms of touching a student, including for the purpose of guiding them along a physical path, helping them up after a fall, engaging in

a rescue or the application of Cardiopulmonary Resuscitation (CPR) or other emergency first-aid. Nor does it prohibit the use of reasonable force and touching in self-defense or in the defense of another.

Restraining a child who is trying to engage in violent or inappropriate behavior may also be permitted. Only such force as necessary to defend one's self or another or to protect property is legally allowed. Excessive force is prohibited. Violation of this policy could subject the teacher or staff member to discipline to include termination for cause. The victim may also choose to bring civil or criminal charges against the violator. This policy must necessarily be somewhat flexible. Sometimes, especially when dealing with younger children or children with a disability, touching is more appropriate. A touch for the purpose of helping (i.e.: cleaning up a small child after a bathroom accident) may be appropriate in limited circumstances although clearly inappropriate in more general circumstances. It is impossible to define each and every instance when touching is inappropriate. Teachers and staff members must apply the rules of common sense in the circumstances they find themselves.

#### **D. Off-duty Conduct**

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

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

The School will comply with all federal and state regulations regarding drug and alcohol use while employees are on the job. This policy covers all School employees and violation of the School's policy related to drug use is grounds for immediate termination.

The School is concerned about the use of alcohol, illegal drugs and controlled substances as it affects the workplace, the School community and students. Use of these substances whether on or off the job will adversely affect an employee's work performance, efficiency, safety, and health and therefore seriously impair the employee's value to the School and its students. In addition, the use or possession of these substances on the job constitutes a potential danger to the welfare and safety of other employees and students and exposes the School to the risks of property loss or damage or injury to other persons. The unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the workplace.

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



- Drive a company vehicle, or a vehicle designated for school business, while under the influence of alcohol or an illegal or controlled substance;
- Sell or purchase an illegal or controlled substance, including while on the job, on the School's property, or in the presence of students;
- Possess or use alcohol or an illegal or controlled substance while on the job, on school property, or in the presence of students,
- Be under the influence of alcohol or an illegal or controlled substance while on the job, or on the School's property

The School will establish a drug-free awareness program to inform employees about:

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

Violation of these rules and standards of conduct will not be tolerated and may result in disciplinary action, up to and including termination of employment. The School may also bring the matter to the attention of appropriate law enforcement authorities. The School may terminate an employee who is convicted of a controlled substance offence to the extent allowed by law. Alternatively, the School may, as required or allowed in accordance with applicable law, require the employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for these purposes by a Federal, State or local health, law enforcement, or other appropriate agency. As a condition of employment, employees are required to notify the School in writing of any conviction for a violation of a criminal drug statute occurring in the workplace. Such notification must be made no more than five (5) calendar days after the conviction. The School may, as required by applicable law, notify federal or state agencies of any applicable employee convictions if such a report is required by law.

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

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

## **F. Tobacco Free Workplace**

The School is a tobacco free workplace. No tobacco products are to be used in the workplace or at work functions. This includes all VAPE products.

## **G. Punctuality and Attendance**

You are part of a team, and getting the work done depends on everyone being in the right place at the right time. As an employee, you must be conscientious about your attendance and punctuality at work. Attendance is also an important measure of your overall performance on the job. Employees are expected to be punctual and regular in attendance. Any tardiness or absence causes problems for students and fellow employees. To avoid conflict with the daily operations of the School, employees must schedule personal affairs outside of regular working hours. When an employee is absent, others must perform their assigned work. Employees are expected to report to the workplace and be prepared to begin work at their scheduled reporting times.

If the employee is unable to report for work on any particular day, they must under all but the most extenuating circumstances call their supervisor or Human Resources at least one hour before the time they are scheduled to begin working on that day, and must obtain approval for their absence from the Executive Director or designee. In all cases of absence or tardiness, employees must provide the School with an honest reason or explanation.

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

If the employee fails to report for work without any notification to their supervisor or to Human Resources and the absence continues for a period of three days, the School will consider it a voluntary resignation unless a written medical excuse is provided by a physician to determine that the employee has abandoned their employment.

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

## **H. Professionalism**

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

Below are several things employees will do to help leave people with a good impression of the School. These are the building blocks for the school's continued success.

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

The employee may not bring their own children to school events (learning plan meetings, CAASPP testing, school meetings, etc.) unless they are participants in the events or it is a general school event open to all students or employee families. The Executive Director or designee may grant an exception.

## **I. Dress Code**

Each employee is a representative of the School in the eyes of the public. Each employee must report to work properly groomed and dressed in professional attire. Employees are expected to dress appropriately and in a manner consistent with the nature of the work performed.

Employees who report to work inappropriately dressed may be asked to clock out and return in acceptable attire.

Violation of the dress code is determined by the Executive Director or designee. The Executive Director or designee may issue more specific dress code guidelines at any time, which shall be in accordance with law.

## **J. Gifts to Employees**

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

## **K. Fee and Cash Collection**


No staff member, other than specifically authorized individuals, is permitted to accept cash and/or checks. All school events, for which money is collected, must be

approved by the Executive Director. The Executive Director will supervise the collection of all fees and will be responsible for managing the receipts with student services Purchasing. Teaching staff and students are not permitted to do fundraising or fee collection; rather, all financial transactions must be coordinated with the Executive Director. Teachers and staff are not permitted to conduct personal sales or fundraising (such as Avon, bath/beauty products, etc.). Cash and/or checks must not be stored or locked in staff offices or desks.

## **L. Building Security**

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

## Appendix G: CAASPP Testing Security Form

  
**EXCEL ACADEMY'S CAASPP TEST SECURITY FORM (ONE per family)**

**Family's Last Name** \_\_\_\_\_

**Test Site/Location** \_\_\_\_\_ **ToR Name** \_\_\_\_\_

**Student Information** **Cell Phone at Test Site Y/N**

Student's Name \_\_\_\_\_ Grade \_\_\_\_\_ Y or N

Student's Name \_\_\_\_\_ Grade \_\_\_\_\_ Y or N

Student's Name \_\_\_\_\_ Grade \_\_\_\_\_ Y or N

Student's Name \_\_\_\_\_ Grade \_\_\_\_\_ Y or N

**Parent's Name** \_\_\_\_\_ **Cell Phone #** \_\_\_\_\_

**List student's name and allergies (if applicable) and important details for test site lead.**

\_\_\_\_\_

\_\_\_\_\_

**In case of an emergency, please contact** \_\_\_\_\_

**Phone Number(s)** \_\_\_\_\_

The following individual(s) have my permission to drop off/pick up my child(ren).

1. Name \_\_\_\_\_ Phone \_\_\_\_\_

2. Name \_\_\_\_\_ Phone \_\_\_\_\_

If you have a high school student that will be driving to the test site on his/her own, and wish to allow your student to sign in/out for himself/herself, please complete this portion.

\_\_\_\_\_ My high school student has my permission to sign himself/herself in and out.

\_\_\_\_\_ My high school student has my permission to sign his/her siblings in and out.

**NOTE - I understand that cell phones/smart watches might be collected at the start of each testing day and returned to the student(s) at the end of each testing day. Cell phones/smart watches must be turned off during testing. For safety purposes, I understand that backpacks are not allowed. Please bring lunch/snack in a clear bag.**

**Parent's Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

## Appendix H: Triage Guidelines

### Immediate Classification

These students get priority medical care and transportation to an advanced care facility. These victims are critically injured, life threatened, but salvable. They will die within one hour or less without further treatment and require immediate field intervention to survive.

After assignment to the immediate classification, the students are then further divided into two additional groups. The two subgroups are the immediate life threatened, and the potentially life threatened. Injury patterns seen in this group include:

- Head injuries with decreasing level of consciousness:
- Airway/chest injuries with associated cardiorespiratory or respiratory compromise:
- Shock associated with hemorrhage:
- Blunt or penetrating abdominal trauma;
- Life threatening fractures such as femur, pelvic, etc.
- Third degree burns over 25% BSA (body surface area) but under 50% BSA, excluding facial involvement.

Medical problems assigned to the immediate classification include:

- Chest pain not associated with blunt trauma:
- Suspected hypo/hyperglycemia:
- Unconscious without associated trauma:
- Obstetrical problems:
- Seizures with or without trauma:
- Hysterics requiring isolation from others:
- Hypothermia
- Hyperthermia

### Delayed Classification

Anyone in this classification is considered to be a lower priority victim. Since this is a two-tiered system, the “delayed” group is a catchall for any victims other than those who are life-threatened or with salvable injuries. Therefore, the injuries seen in this classification include:

- Serious injuries, non-life-threatening, including:
  - Fractures with distal pulse
  - Serious lacerations requiring repair
  - Third-degree burns less than 25% BSA
  - Second-degree burns of any percentage
  - Injuries to the eye
  - Spinal cord injuries

- Minor injuries requiring first aid treatment only and the non-injured. This group will be transported to an ambulatory holding or evacuation center. They do not need to tie up hospital facilities.
- The dead at the scene. These are sent to a common morgue area.
- Critically injured, seriously life-threatening, non-salvable patients.

### Appendix I: Suicide Prevention

The publications of many organizations and governmental agencies contain advice for people who are faced with suicidal people. That advice is summarized below.

#### Do's

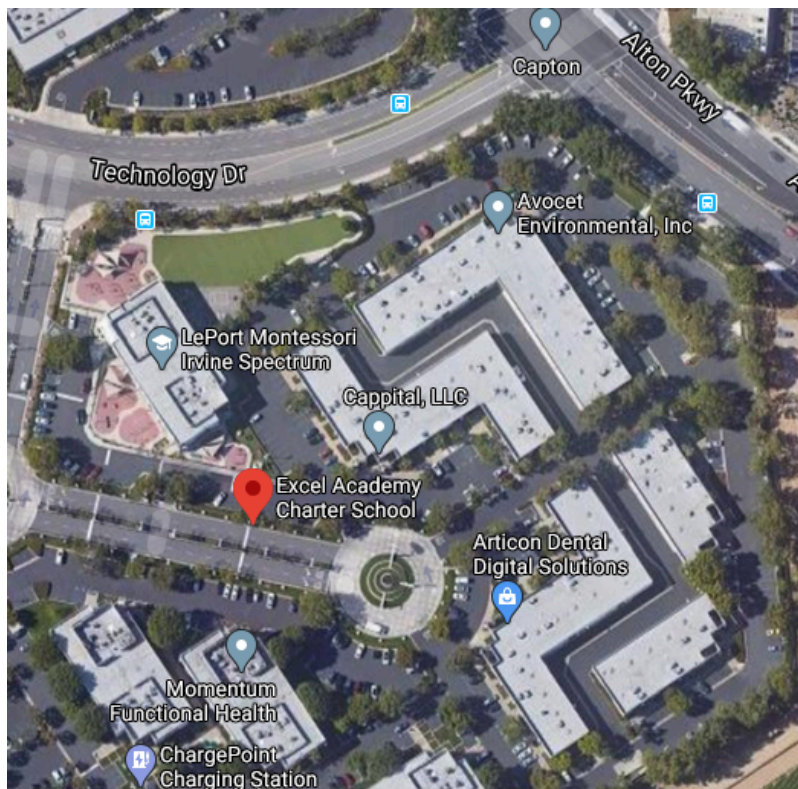
- **Listen** to what the person is saying and take suicidal threats seriously. Many times a person may be looking for just that assurance.
- **Observe** the person's nonverbal behavior. In children and adolescents, facial expressions, body language, and other concrete signs often are more telling than what the person says.
- **Ask** whether the person is really thinking about suicide. If the answer is "YES," ask how they plan to do it and what steps have already been taken. This will convince the person of your attention and let you know how serious the threat is.
- **Get Help** by contacting an appropriate Crisis Response Team member. Never attempt to handle a potential suicide by yourself.
- **Stay** with the person. Take the person to a CRT member and stay with that person for a while. The person has placed trust in you, so you must help transfer that trust to the other person.

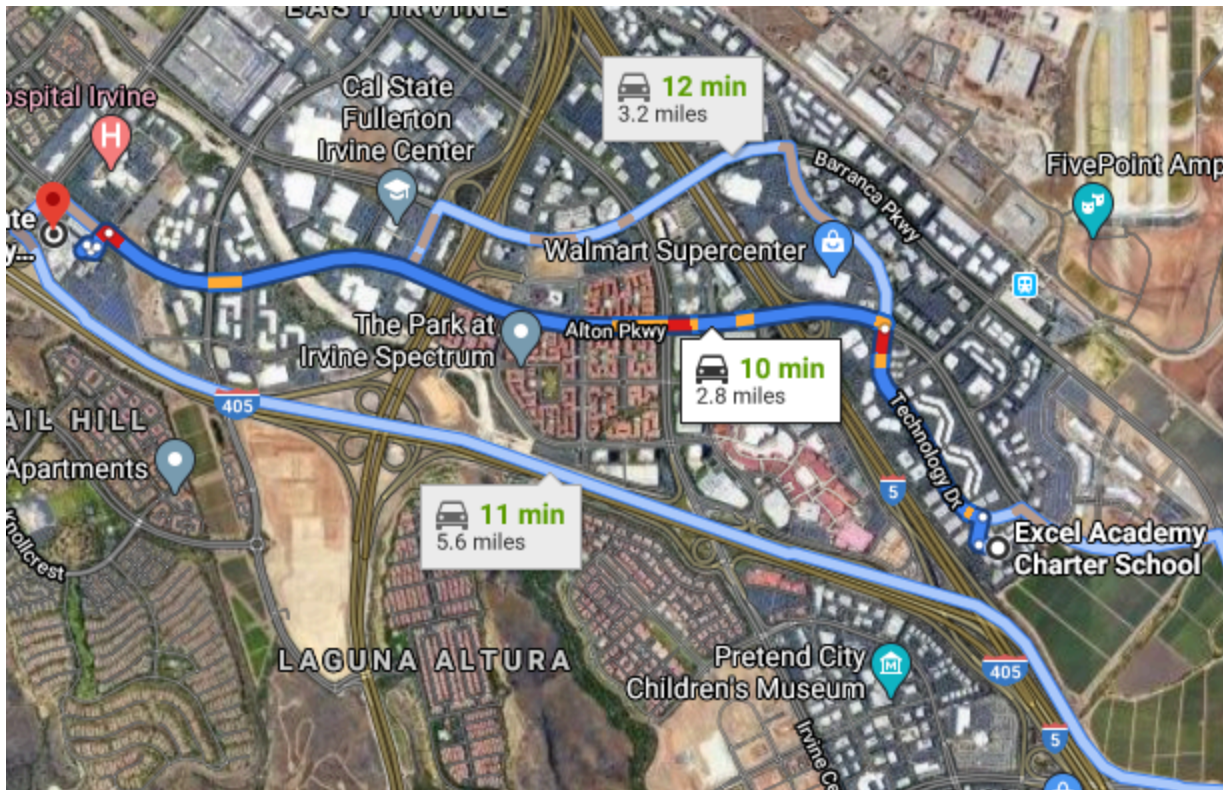
#### Don'ts

- **Don't** leave the person alone for even a minute.
- **Don't** act shocked or be sworn to secrecy.



- **Don't** underestimate or brush aside a suicide threat (“You won't really do it; you're not the type”), or to shock or challenge the person (“Go ahead. Do it”). The person may already feel rejected and unnoticed, and you must not add to the burden.
- **Don't** let the person convince you that the crisis is over. The most dangerous time is precisely when the person seems to be feeling better. Sometimes, after a suicide method has been selected, the person may appear happy and relaxed. You must, therefore, stay involved until you get help.
- **Don't** take too much upon yourself. Your responsibility to the person in a crisis is limited to listening, being supportive, and getting them to a trained professional. Under no circumstances must you attempt to counsel the person.





## Appendix J: Excel Academy Office Contact Information

**School Year:** 2021-2022

**Site Name:** Excel Academy Charter School

**Purpose:** Main Excel Academy Offices

**Location:** 1 Technology Drive Suite I-811 Irvine, CA 92618

**Phone:** (949) 387-7822

**Website:** [www.excelacademy.education](http://www.excelacademy.education)

**Email:** [admissions@excelacademy.education](mailto:admissions@excelacademy.education)

### Site Description:

- Monday through Friday 7am to 4:30pm. Closed all Federal holidays.

### Property Managed by:

The Irvine Company  
7525 Irvine Center Drive

Irvine, CA 92618  
M-F 8am-5:30pm  
949-398-8900

24 Hour Security & After Hours: (866) 234-9851  
Hazardous Material Reporting: (714) 433-6240  
Orange County Fire Authority: (714) 573-6000  
Irvine Police Dept. (949) 724-7200  
Poison Control (949) 222-1222

## **Appendix K: Emergency Contact Phone Numbers**

1. POISON CONTROL HOTLINE.....(800) 222-1222
2. LA COUNTY DISASTER HOTLINE..... (800) 980-4990
3. AMERICAN RED CROSS.....(661) 267-0650
4. SOUTHERN CALIFORNIA EDISON.....(800) 611-1911
5. SUBURBAN PROPANE.....(661) 942-5117
6. LOS ANGELES COUNTY WATERWORKS.....(877) 637-3661
7. ORANGE COUNTY SHERIFF'S DEPT..... (714) 647-7000
8. LA COUNTY SHERIFF'S DEPARTMENT..... (213) 229-1700

## Appendix L: Incident Report



California Pacific Charter Schools • Community Collaborative Schools  
Keppel Partnership Academy

### EXCEL ACADEMY INCIDENT REPORT

**Circle Location of Incident:** School Office Test Site Field Trip

**Name of Test Site or Field Trip:** \_\_\_\_\_

<b>Date of Incident:</b>	<b>Student's Name:</b>	<b>Grade:</b>
<b>DOB:</b>	<b>Education Specialist:</b>	<b>School:</b>
<b>Description of Incident:</b>		
<b>Student's signs and symptoms:</b>		
<b>If allergic reaction, actions taken before medication was administered:</b>		
<b>Actions taken, if NOT allergic reaction:</b>		

<b>Person (and title) who called 911:</b>	<b>Time of call to 911:</b>
<b>Medication administered (if allergic reaction):</b>	<b>Dose:</b>
<b>Route:</b>	<b>Time:</b>
<b>Student's response to medication (if allergic reaction):</b>	
<b>Other Medications administered (if allergic reaction):</b>	<b>Dose:</b>
<b>Route:</b>	<b>Time:</b>
<b>Other Interventions or occurrences (if any):</b>	
<b>Time paramedics arrived:</b>	<b>Incident information given by (to paramedics):</b>
<b>Time emergency contact was notified (parent/guardian/etc.):</b>	<b>Name of emergency contact (Parent/guardian/etc.):</b>
<b>Method of notification (phone, text, email, in-person, etc.):</b>	<b>Emergency contact notified by:</b>
<b>Time person was transported to emergency room:</b>	

<b>Parent contacted (phone or in person)</b>	<b>Parent Name:</b>
<b>Parent contact on...</b>	<b>Date:</b> <b>Time:</b>
<b>Report completed by (Print clearly):</b>	
<b>Report completed by (Signature):</b>	
<b>Report completed on (Date):</b>	

MASTER PLAN  
for  
ENGLISH LEARNERS  
Excel Academy Charter School



Approved by the Excel Academy Charter School Board of Trustees (June 2024)

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

Presented by: Heidi Gasca, Executive Director

**EACS EL Master Plan Committee Members:**

Jennifer Craig  
Tamara Murphy  
April Saade  
Lara Ulmer



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### **Mission and Vision**

Excel Academy will provide 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.

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

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

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

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

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

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

### **Home Language Survey**

For all students in K–12, upon first enrollment in a California public school, the Local Education Agency (LEA) uses a standardized procedure to determine a student's primary language. This procedure begins with a home language survey (HLS), which is completed once by the parent or guardian at the time the student is initially enrolled in a California public school. The HLS should not be readministered every year nor readministered if a student enrolls in a new LEA. If the HLS is completed in error, the parent or guardian may make a request to change it prior to the assessment. However, once a student is identified as an EL on the basis of the results of the Initial ELPAC, and the student has been administered the Summative ELPAC, changing the HLS will not change the student's identification. While cumulative student records are in transit for a student transferring from another California School District, CALPADS shall be used to determine whether a student has a history of being an English Language Learner.

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

### **ELPAC Testing**

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

The Initial ELPAC has one purpose:

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

The Summative ELPAC has two purposes:

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

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

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

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

ELPAC results are not used to measure academic achievement. The Initial ELPAC results are used to identify ELs who need to develop their skills in listening, speaking, reading, and writing in English. This information, used with other local assessments, assists LEAs and schools when making placement decisions for new students who are identified as ELs. The Initial ELPAC results also are used to identify students who are IFEP and are able to participate in the regular (core) academic program without further English language support. The Summative ELPAC results are used to see how well ELs are progressing

annually toward ELP (English Language Proficiency). This information is used to assist LEAs and schools in the ongoing process of program monitoring and evaluation. The Summative ELPAC results also form one of four criteria used to determine whether ELs are ready to be classified as RFEP on the basis of the reclassification process developed by the LEA, in accordance with state law.

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

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

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

The Initial ELPAC report includes the following information:

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

Initial ELPAC Performance Level Descriptors are:

- Initial Fluent English Proficient (IFEP): Students at this level have well developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways that are appropriate to different tasks, purposes, and audiences in a variety of social and academic contexts. They may need occasional linguistic support to engage in familiar social and academic contexts; they may need light support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the "Bridging" proficiency level as described in the 2012 California English Language Development Standards, Kindergarten Through Grade 12 (2012 ELD Standards).
- Intermediate English Learner: Students at this level have somewhat developed to moderately developed oral (listening and speaking) and written (reading and writing) skills. This level captures a broad range of English learners, from those who can use English only to meet immediate communication needs to those who can, at times, use English to learn and communicate in meaningful ways in a range of topics and content areas. They may need some degree of linguistic support to engage in familiar social and academic contexts (depending on the student, the level of support needed may be moderate, light, or minimal); they may need substantial to moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the entire "Expanding" proficiency level and to the lower range of the "Bridging" proficiency level as described in the 2012 ELD Standards.
- Novice English Learner: Students at this level have minimally developed oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts; they need substantial linguistic support to communicate on less familiar tasks and topics. This test performance level corresponds to the "Emerging" proficiency level as described in the 2012 ELD Standards.

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

The official score for the Summative ELPAC is produced by the test contractor. Individual student Summative ELPAC results include an overall scale score and two composite scale scores which will

indicate which of the four performance levels the student achieved. The four performance levels are: well developed (4), moderately developed (3), somewhat developed (2), and beginning to develop (1).

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

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

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

The Summative ELPAC Performance Level Descriptors are:

- Level 4: English Learners at this level have well developed oral (listening and speaking) and written (reading and writing) skills. They can use English to learn and communicate in meaningful ways that are appropriate to different tasks, purposes, and audiences in a variety of social and academic contexts. They may need occasional linguistic support to engage in familiar social and academic contexts; they may need light support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the “Bridging” proficiency level as described in the 2012 California English Language Development Standards, Kindergarten Through Grade 12 (CA ELD Standards).
- Level 3: English Learners at this level have moderately developed oral (listening and speaking) and written (reading and writing) skills. They can sometimes use English to learn and communicate in meaningful ways in a range of topics and content areas. They need light-to-minimal linguistic support to engage in familiar social and academic contexts; they need moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the upper range of the “Expanding” proficiency level through the lower range of the “Bridging” proficiency level as described in the CA ELD Standards.
- Level 2: English Learners at this level have somewhat developed oral (listening and speaking) and written (reading and writing) skills. They can use English to meet immediate communication needs but often are not able to use English to learn and communicate on topics and content areas. They need moderate-to-light linguistic support to engage in familiar social and academic contexts; they need substantial-to-moderate support to communicate on less familiar tasks and topics. This test performance level corresponds to the low- to mid-range of the “Expanding” proficiency level as described in the CA ELD Standards.
- Level 1: English Learners at this level are beginning to develop oral (listening and speaking) and written (reading and writing) English skills. They tend to rely on learned words and phrases to communicate meaning at a basic level. They need substantial-to-moderate linguistic support to communicate in familiar social and academic contexts; they need substantial linguistic support to communicate on less familiar tasks and topics. This test performance level corresponds to the “Emerging” proficiency level as described in the CA ELD Standards.

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

The state-adopted ELD Standards establish a framework for teachers to follow as they facilitate students’ development of the skills necessary to meet grade-level standards in English language arts and the content areas. The standards describe what students should know and be able to do at each of the five levels of English proficiency. Each ELD standard is tied to one or more of the grade level English

Language Arts Standards and serves as a measure for determining a student's progress toward meeting the English Language Arts Standards. When students attain the early advanced proficiency level, they are expected to be reclassified and meet the same rigorous grade-level standards as native English speakers are expected to master.

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

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

### **English Language Mainstream Program**

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

- Core instruction in language arts, math, science and social science is taught in English using charter approved curriculum and SDAIE methodology.
- English Language Learners receive English Language Development (ELD) instruction which addresses the ELD standards in listening, speaking, reading and writing. EACS students will engage in synchronous and asynchronous instruction.

*As a comprehensive approach to ELD, the English Language Arts/English Language Development (ELA/ELD) Framework for California Public Schools states:*

*“English learners at all English proficiency levels and at all ages require both Integrated ELD and specialized attention to their particular language learning needs, or Designated ELD.” (p. 119)*

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

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

- Teachers working with EL students will be appropriately authorized, i.e. CLAD or equivalent.

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

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

*SDAIE Strategies:*

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

**English Language Development (ELD) Instruction**

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

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

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

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

The ability to read, write, and communicate with competence and confidence in English across a range of personal and academic contexts expands students' opportunities for career and college success, full and



wise participation in a democratic society and global economy, and achievement of their personal aspirations. Moreover, skill in literacy and language provides individuals with access to extraordinary and powerful literature that widens perspectives, illuminates the human experience, and deepens understandings of self and others.

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

#### Key Themes of ELA/Literacy and ELD Instruction

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

##### **Meaning Making**

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

##### **Language Development**

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

##### **Effective Expression**

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

##### **Content Knowledge**

Content knowledge is a powerful contributor to comprehension of text. It also undergirds the ability to write effective opinions/arguments, narratives, and explanatory/informational text; engage in meaningful

discussions; and present ideas and information to others. It contributes significantly to language development, and it is fundamental to learning about how English works. Both sets of standards ensure that students can learn from informational texts and can share their knowledge as writers and speakers. An organized independent reading program contributes to knowledge. Content knowledge has a powerful reciprocal relationship with the development of literacy and language.

### **Foundational Skills**

Acquisition of the foundational skills enables students to independently read and use written language to learn about the world and themselves; experience extraordinary and diverse works of literary fiction and nonfiction; and share their knowledge, ideas, stories, and perspectives with others. Students who know how to decode and develop automaticity with an increasing number of words are best positioned to make significant strides in meaning making, language development, effective expression, and content knowledge. At the same time, attention to those themes provides the very reason for learning about the alphabetic code and propels progress in the foundational skills.

### **Parent Notification of Programs**

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

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

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

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

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

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

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

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

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

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

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

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

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

- Urgency: Focus urgently on accelerating LTEL progress towards attaining English proficiency and closing academic gaps.
- Distinct needs: Recognize that the needs of LTEs are distinct and cannot adequately be addressed within a "struggling reader" paradigm or a generic "English Language Learner" approach, but require an explicit LTEL approach.
- Language, literacy, and academics: Provide LTEs with language development, literacy development, and a program that addresses the academic gaps they have accrued.
- Home language: Affirm the crucial role of home language in a student's life and learning, and provide home language development whenever possible.
- Three R's: rigor, relevance, and relationships: Provide LTEs with rigorous and relevant curriculum and relationships with supportive adults (along with the support to succeed).

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

### **Instructional Support System**

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

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

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

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

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

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

In Excel Academy Charter School each English Learner is held to the same charter adopted curriculum standards in the core curricular areas of English Language Arts, math, history-social

science and science as every other charter student. In addition, each EL student is expected to demonstrate mastery of the adopted ELD standards.

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

Excel Academy Charter School supports each English Learner in his/her appropriate level of language development in the core courses. Each English Learner participates in an instructional program with state adopted materials that are aligned to charter and state standards. Staff members, through articulation meetings, discuss and interpret data on English Learner students to address the issues surrounding English Learners who may have been in the educational system for some time and seem to be unable to move beyond this level.

## **3. Assessment and Reporting**

Excel Academy Charter School administers all state mandated examinations. ELPAC assessments and ongoing multiple measures are used to assess student proficiency. Results are entered onto the EL Master Tracking Spreadsheet for instructional planning and monitoring. Overall student results are shared with the CEO and governing board.

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

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

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

## **Staffing Authorizations**

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

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

## **Professional Development**

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

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

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

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

### **Reclassification**

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

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

### **Reclassification Criteria**

Excel Academy Charter School uses the following criteria to reclassify EL students to RFEP status:

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

### **Reclassification Process**

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

Based on the above reclassification criteria, if a student is deemed to qualify for reclassification, a letter will be drafted by the administration. The letter will include all data pertinent to the reclassification. Once the letter has been signed by the administration and the parents of the student, the reclassification will take place. The language acquisition status of the student will be updated in the student information, on

the EL Master Tracking Spreadsheet and ultimately in the state reporting system (CALPADS). Additionally, all teachers associated with the student will be informed of the reclassification.

### **Monitoring of Reclassified Students**

The No Child Left Behind Act of 2001, Title III requires that reclassified students be monitored for a period of at least 24 months following reclassification. The school's Lead, teachers, parents, and the assessment Lead supervise the process of monitoring reclassified students. School staff will use the Smarter Balanced assessment, local multiple measure scores, and teacher assessments and observations to semi-annually monitor the progress of RFEP students for a period no less than four (4) years after reclassification. Student performance shall be reviewed at each progress reporting period. Those students found to be regressing in their academic performance will be referred to receive an academic intervention in the specific area of need. This monitoring of RFEP students is recorded on the EL Master Tracking Spreadsheet.

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

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

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

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

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

- Making decisions about the content of a student's IEP, including whether a student must take a regular state assessment (in this case, the ELPAC assessment), with or without appropriate universal tools, designated supports and/or accommodations, or an alternate assessment in lieu of the regular ELPAC assessment (ED, July 2014, FAQ #4).
- Developing an IEP for each student with a disability, including each EL with a disability, at an IEP team meeting, which includes school officials and the child's parents/guardians. The Individuals with Disabilities Education Act (IDEA) regulation in Code of Federal Regulations, Title 34, (34 CFR) Section 300.321(a) specifies the participants to be included on each child's IEP team. It is essential that IEP teams for ELs with disabilities include persons with expertise in English language acquisition and other professionals, such as speech-language pathologists, who understand how to differentiate between English proficiency development and a disability (ED, July 2014, FAQ #5).
- Ensuring that ELs' parents or guardians understand and are able to meaningfully participate in IEP team meetings at which the child's participation in the annual state ELP assessment is discussed. If a parent whose primary language is other than English is participating in IEP meetings, the IDEA regulations require each public agency to take whatever action necessary to ensure that the parent understands the proceedings of the IEP team meeting, including arranging



for an interpreter (34 CFR Section 300.322[e]). When parents themselves are ELs, Title VI of the Civil Rights Act of 1964 also requires that the LEA effectively communicate with parents in a manner and form they can understand, such as by providing free interpretation and/or translation services (ED, July 2014, FAQ #6).

- Ensuring that all ELs, including those with disabilities, participate in the annual state ELPAC assessment, with or without universal tools, designated supports, and accommodations or take the Alternate ELPAC, if necessary (ESSA Section 1119[b][7] and IDEA Section 612[a][16][A]). An IEP team cannot determine that a particular EL with a disability should not participate in the annual state ELP assessment (ED, July 2014, FAQ #7).

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

### **SpEd: Assessment**

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

### **SpEd: Classification**

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

### **Needs of English Learners**

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

#### **Student Information:**

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

#### **Present Levels:**

- Most recent ELPAC scores should be listed for each domain area (list performance level as well as scaled score)

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

#### **Special Factors:**

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

#### **Annual Goals:**

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

#### **Services:**

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

#### **Writing Linguistically Appropriate Goals and Benchmarks-**

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

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

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

### **Special Education EL Reclassification**

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

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

### **Avoid:**

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

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

### **Parent Advisory Committees**

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

- Advising the Administration and staff in the development of a site plan for English Learners and submitting the plan to the School Site Council for consideration of inclusion in the School Plan for Student Achievement.

- Assisting in the development of the schoolwide needs assessment.
- Ways to make parents aware of the importance of regular school attendance.

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

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

#### Legal References

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

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

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

#### **Accountability and Evaluation**

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

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

Excel Academy Charter School's assessment practices with respect to English Learners are designed to:

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

- Monitor that targeted interventions are working

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

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

# Coversheet

## Consent - Personnel Services

**Section:** VII. Consent  
**Item:** C. Consent - Personnel Services  
**Purpose:**  
**Submitted by:**  
**Related Material:** FINAL ToR Manual- 24\_25.pdf

**BACKGROUND:**

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



*Teacher of Record  
Training Manual  
2024-2025 School Year*



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## Highlights of Policy or Procedure Changes for 2024/25

### Admissions

- *Early TK Admittance: Students who turn 4 years old between June 1 - Sept 1 will be allowed to enter TK at the start of the school year for Early TK Admittance. For regular TK admittance, as it was last year, students who turn 5 years old between Sept 2 - June 2 can start TK at the start of the year.*
- *Content & Community Providers Acknowledgement Form: This year, parents will sign their CCP Form alongside their MA and AOR.*

### Community

- *We're making Field Trip and Community Event sign ups easier! No longer will you have to rush to "comment" with your name—we will now be using Sign Up Genius to make the process easier, and more streamlined!*
- *Community Requirements for Personalized ToRs will remain in the same format as last year, however, the option templates have changed. Like 23/24, throughout the school year each ToR will document what they have completed in each column and change the pink cell to **green**. By the end of the school year, each column that is highlighted in pink should appear in green. Ex:*

Option 2		
Community Event	Field Trips	Virtual Lessons
Back to School Event	Medieval Times	Zoom Week - 9/18
Bowling Bonanza	Chino Youth Museum	Zoom Week - 10/20
Edupreneur's Expo		Zoom Week - 12/6

Below are this year's options:

<p><b>Option 1:</b></p> <ul style="list-style-type: none"> <li>• 3 Community Events</li> <li>• 3 Field Trips</li> <li>• 1 Virtual Lesson</li> </ul>	<p><b>Option 2:</b></p> <ul style="list-style-type: none"> <li>• 3 Community Events</li> <li>• 2 Field Trips</li> <li>• 3 Virtual Lessons</li> </ul>
<p><b>Option 3:</b></p> <ul style="list-style-type: none"> <li>• 3 Community Events</li> <li>• 1 Field Trip</li> <li>• 2 Speciality Events</li> </ul>	<p><b>Option 4:</b></p> <ul style="list-style-type: none"> <li>• 3 Community Events</li> <li>• 2 Field Trips</li> <li>• 1 Speciality Event</li> </ul>
<p><b>NHS Option:</b></p> <ul style="list-style-type: none"> <li>• 2 Community Events</li> <li>• 2 Field Trips</li> <li>• NHS Duties</li> </ul>	<p><b>SSC Option:</b></p> <ul style="list-style-type: none"> <li>• 2 Community Events</li> <li>• 2 Field Trips</li> <li>• SSC Duties</li> </ul>
<p><b>Pali Option:</b></p> <ul style="list-style-type: none"> <li>• Pali Overnight (5th-8th graders)</li> </ul>	<p><b>Catalina Option:</b></p> <ul style="list-style-type: none"> <li>• Catalina Overnight (7-12th graders)</li> </ul>

## Crises

The Crises Teams are now split into Elementary & Secondary:

### Secondary Crisis Team

Lorrie Wood, Secondary Principal: (805) 931-6720 lwood@excelacademy.education  
 Larissa Allen-Jefferson, School Counselor: lallenjefferson@excelacademy.education  
 Daniel Favela, School Counselor: dfavela@excelacademy.education

### Elementary Crisis Team

April Saade, Elementary Principal: (949) 774-6231 asaade@excelacademy.education  
 Caroline Forester, Elementary Counselor: (619) 786-8270, cforester@excelacademy.education

## Documentation:

Contact Manager requirements have been adjusted:

### Contact Manager

Documenting contact with your families and important student information is easy in the SIS. The first area this is possible is through Contact Manager, which will be used for the following:

- ❖ Documenting a phone call, rescheduled LP Meetings with reason or concerns

- ❖ *Documenting a phone call that pertains to an issue that might lead to a BIP or PIN*
- ❖ *Conversations with parents about complaints, or them refusing to comply with school expectations (samples, assessments, WIN, curriculum, etc)*
- ❖ *Document meetings that are held and include the date: SST, AIM, 504 Plan, Best Interest (PIN3), IEP, Manifestation, etc.*
- ❖

## Secondary

- *Rosters will be considered full time with a maximum of 25 students.*
- *For Secondary students new to Excel, please follow the process outlined in the [New Secondary Student Checklist](#). These students will need to meet with their counselor before the MA can be written.*
- *The graduation policy has been updated for all incoming Freshman to include the “soft” requirement of choosing one of the six College and Career Indicators to complete: CTE courses, CAASPP standards met; concurrent enrollment, Seal of Biliteracy, A-G completion, or AP courses.*
- *WIN requirements will continue for 7th-8th grade and there are [updated requirements](#) for high school..*
- *Quarterly progress reports will be issued by ToRs for quarter 1 and quarter 3 for any student falling below 70%.*
- *Turnitin.com will replace Google for the plagiarism checker and authentic, proctored writing samples will be required within the first LP More information to come.*
- *Advanced Junior High students can add Honors designation by following the [SOAR requirements](#).*

# Department Highlights

## Intervention

### Who to Contact

<i>WIN List &amp; Interventions Program</i>	<i>Sarah Horikawa</i>	<i>WIN Classes</i>	<i>Tamara Murphy</i>
<i>WIN Compliance</i>	<i>Sarah Horikawa</i>	<i>ELD Classes</i>	<i>Tamara Murphy</i>
<i>SST Meetings TK-6</i>	<i>Tamara Murphy</i>	<i>Homeless/Foster Youth</i>	<i>Assigned Counselor</i>
<i>SST Meetings 7-12</i>	<i>Alison DeSchaine</i>	<i>SPED Referrals</i>	<i>Noell Scott &amp; Tamara Murphy</i>
<i>504 Meetings TK-6</i>	<i>April Saade</i>	<i>Acceleration/Retention</i>	<i>Principal</i>
<i>504 Meetings 7-12</i>	<i>Assigned Counselor</i>		





## *Staff Protocol for Crisis Response*

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

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

### *Alarming Concerns of Any Kind*

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

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

### *Crisis Team:*

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

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

Outside of School Hours: Contact Keri Schneeweiss or Heidi Gasca

Secondary Crisis Team

Lorrie Wood, Secondary Principal: (805) 931-6720 lwood@excelacademy.education

Larissa Allen-Jefferson, School Counselor: lallenjefferson@excelacademy.education

Daniel Favela, School Counselor: dfavela@excelacademy.education

Elementary Crisis Team

April Saade, Elementary Principal: (949) 774-6231 asaade@excelacademy.education

Caroline Forester, Elementary Counselor: (619) 786-8270, cforester@excelacademy.education

Supporting Members:

\* These staff members will be contacted by the Core Crisis Team as deemed necessary\*

Rebecca Metoyer, School Psychologist: (714) 367-6749, rmetoyer@excelacademy.education

Noell Scott, School Psychologist: (949) 382-1198, nscott@excelacademy.education

Keri Schneeweiss, Director of Educational Services: (949) 742-2399,

kschneeweiss@excelacademy.education

Heidi Gasca, Executive Director: (949) 412-3122, hgasca@excelacademy.education

## **Staff Contacted when Student is in Immediate Crisis**

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

- ❖ LA County DCFS: (800) 540-4000
- ❖ OC County CPS: (714) 940-1000 or (800) 207-4464
- ❖ Riverside DCSS: (800)442-4918
- ❖ San Bernardino CPS: (800) 827-8724
- ❖ San Diego CPS: (858) 560-2191 or (800) 344-6000
- ❖ Ventura County CFS: (805) 654-3200 or 1-800-754-7600.
- ❖ National Child Abuse Hotline: (800) 442-4453

## ToR Protocol *After Crisis*

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

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

## *Active Harm to Self/Others with Excel Staff Present*

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

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

## Reporting All Homicidal Threats is Required by Law

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

A "threat or perceived threat" is defined by the law as: "any writing or action of a pupil that creates a reasonable suspicion that the pupil is preparing to commit a homicidal act related to

*school or a school activity.” (Ed. Code, § 49390(e).) A threat or perceived threat may be based on a student’s “possession, use, or depictions of firearms, ammunition, shootings, or targets in association with infliction of physical harm, destruction, or death in a social media post, journal, class note, or other media associated with the pupil.” A threat or perceived threat may also be based on “a warning by a parent, pupil, or other individual.”*

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

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

### *Signs of Suicide, Self-Harm, & Emotional Distress*

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

- *Cutting*
- *Burning*
- *Head banging*

#### *Risk Factors for Suicide*

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

#### *Warning Signs*

- *Suicidal ideation*

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

## *ToR Referral Protocol for Mental Health Conditions*

### *Mental Health Condition*

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

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



### *ToR Protocol*

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

### *Crisis Services and Resources for Students:*

[Click here for a link to Mental Health Referrals by County](#)

### Care Solace

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

<https://caresolace.com/site/excelacademy>

### CalHOPE Warm Line:

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

Call: (833) 317-HOPE (4673)

### Live Chat

<https://www.calhope.org/>

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

<https://988lifeline.org/>

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

<https://suicidepreventionlifeline.org/chat/>

**The Trevor Lifeline:** The only nationwide, around-the-clock crisis intervention and suicide prevention lifeline for lesbian, gay, bisexual, transgender, and questioning young people, 13-24, available at 1-866-488-7386.

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

[www.thetrevorproject.org](http://www.thetrevorproject.org)

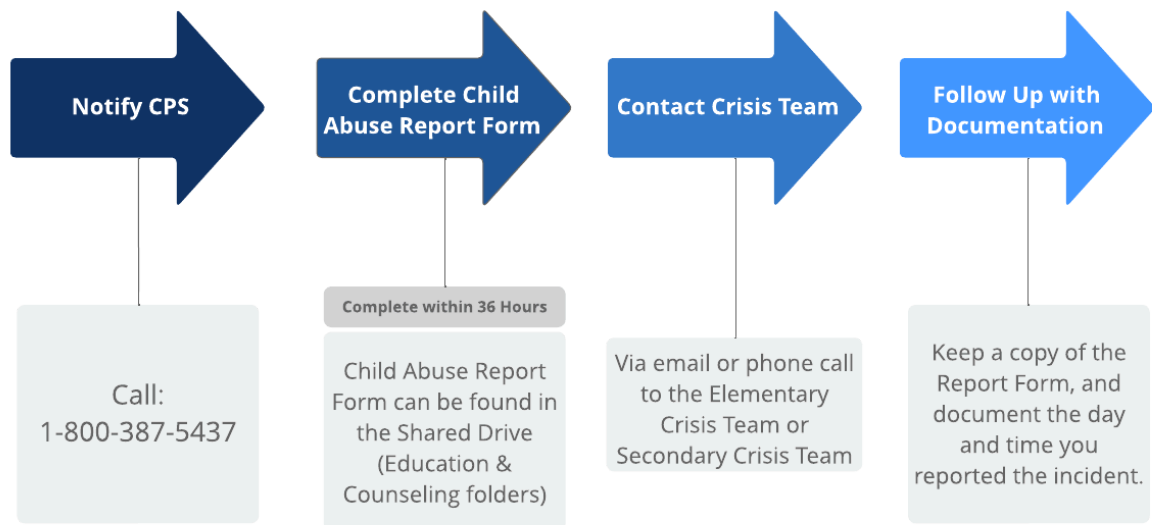
Crisis Text Line is a free, 24/7, confidential text message service for people in crisis. Text HOME to 741741 in the United States

<https://www.crisistextline.org/>

# CPS Protocol

## CPS Protocol

In the event you witness, have knowledge of, or suspect any form of abuse occurring to a child at Excel Academy, please immediately follow the steps listed below.



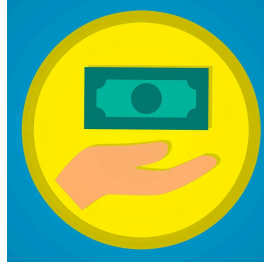
## Mandated Reporter Form

### Child Protective Services

- ❖ LA County DCFS: (800) 540-4000
- ❖ OC County CPS: (714) 940-1000 or (800) 207-4464



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



# *Instructional Funds, Materials, and Content & Community Providers*

## *Instructional Funds Information and Guidelines*

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

*Guidelines are as follows:*

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

- *Students who are enrolled on the first day of the school year will have the maximum amount of appropriated funds when planning their educational program. Students who enroll later in the year will have less than the maximum amount of appropriated funds with which to plan.*
- *For the 24/25 school year, the maximum IF appropriation for each student on the personalized path is \$3,400 for TK-8, and \$3,900 for Grades 9-12; and 1-8 virtual path students is \$2,100, for those students who are enrolled for the entire 175 school days. The IF's are placed into the fund account in multiple disbursements throughout the school year. No school funding is provided directly to parents or students for any purpose.*
- *All families must have the [Content & Community Provider Agreement](#) on file with their TOR before being allowed to request purchase orders*
- *Excel Academy reserves the right to determine what services and materials will best promote the student's academic achievement. IF spending ought to be considered as being ultimately at the school's discretion.*
- *April 4, 2025 is the deadline for orders to be submitted and approved in OPS. It is vitally important to place orders earlier than the deadline. After the deadline, no purchase orders can be submitted. IFs do not roll over from year to year. If the IFs are not used by the deadline the parent will no longer have access to them.*
- *IFs should be spent evenly throughout the year. All orders containing excessive quantities of anything will be reviewed by the Business Services Purchasing Coordinator, Business Services Manager, or administration. It is imperative that the parent and ToR ensure that students receive services and materials throughout the year.*
- *Students must reasonably be able to use all items by the last day of school. If the Business Services Department (also called Student Services) does not believe all items can be used in time, items will be reviewed and non-essential items may be canceled from the order.*

## *Management of Instructional Funds*

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

*purchase orders for extracurricular activities. The administration will mediate any disagreements between parents/guardians and ToRs regarding IF purchases.*

## *Criteria for Materials That Can Be Purchased with Instructional Funds*

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

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

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

*General Criteria:*

- *Educational curriculum ordered is appropriate for the student's courses and learning plan.*
- *Materials must be used to meet state and school standards for the student for whom the materials are being purchased.*
- *All materials must be non-sectarian and non-denominational.*
- *As a general rule, basic, economical items/models must be selected. If the student requires a higher-priced, less than basic item/model, a statement from the ToR justifying the purchase may be required.*
- *School & office supplies adequate for learning basic course skills (paper, pencils, etc).*
- *Materials for a documented educational project: fabric, wool, yarn enough for one project (exception: no food purchases allowed.) ToRs are responsible for monitoring the quantities of items purchased.*
- *Educational software to instruct and enhance learning in a subject area.*
- *Materials must not expose the ToR or student to danger or serious injury.*
- *Tracking forms & educational plans are required for certain items.*
- *School sponsored field trips.*

- No more than 2 black printer ink cartridges and 1 color ink cartridge per semester - Printer must be an Excel purchased printer.
- 1 Toner Cartridge per semester.
- Only 2 reams of paper are allowed per semester per student.
- Organizational items if only intended to be used by the student explicitly for the organization of school supplies.
- Instruments are to be rented out by an approved vendor. If a rental instrument is not in stock, proof needs to be submitted to Business Services that it is not in stock first, in order to purchase an approved instrument. Instruments need to be Purchased no later than January 30th.

Disallowed Items: (Please see complete list [here](#))

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

Disallowed Items by Category:	Household Furniture	Technology	Personal Items	Kitchen	P.E. Equipment	Art	Outdoors	Music	Dangerous Items
	Furniture	Computer Parts	Toys or items with no educational value	Popcorn Popper	Skis	Epoxy/Resin	Grass Watering Kits	Tuner	Knives
	Storage	Accessories & Software(1)	Personal Hygiene	Trays	Bicycles	Cricuts & Accessories	Garden Ponds	Instrument Stools	Poisons
	Storage containers	Phones	Costumes	Plates	Tricycles	Vinyl	Swimming Pools	Drums	Darts
	Picture Frames	Dictation Equipment	Uniforms	Silverware	Scooters	Heat Transfer Paper	Watering Cans	Electric Guitars	Sharp Items
	Footrest	TV's	Clothes	Food Coloring	Yoga Mats	Wax	Sharp Gardening Kits/Tool Set	Amplifier	Bow & arrows
	Chairs	3D Printers & Filament Refills	Makeup	Basic Kitchen Items	Weights	Wax Stamp Kits	Already grown plants	Cello	Weapons
	Lapdesks	Ink (2)	Jewelry	Kitchen Scale	Gloves	Hot Glue Guns	insect lore (1 per semester)	Harp	Welding Equipment
	Iron	Coding Robots over \$50+	Backpacks	Disposable Gloves	Mitts	Pottery wheels	Bubbles/Bubble Machines	Piano	Explosives
	Bookshelves	VR Goggles	Power Tools	Chef Hats/Hair Nets	Bats	Large Easels		Keyboard over \$75	Weedkiller
	Washer/Dryer		Wrapping Paper	Aprons	Rackets	Dried Flowers			Insect Repellant
			Gift Bags		Helmets				Fertilizer
			Soap Making Kits		Golf Clubs				
			Candles		Paddleboards				
			Fingertip Moisturizers		Gymnastics Equipment				
			Hairspray Bottles		Hockey Equipment				
			Balloons		Pogo Sticks				
			Rolling Whiteboards (3)						
			Household Cleaning Supplies						
			Hand Sanitizers						
			Fidget Toys						
			Rubix Cubes						

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

### *Sectarian Materials*

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



### *Technology Options*

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

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

### *Community Provider*

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

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

*\*\*Please note that all service orders must be placed 8 days prior to the start of class to allow time for processing.\*\**

*Excel Academy does not pay for registration fees or membership fees.*

### *Community Provider Policy*

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



### *Field Trips*

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



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

### *Subscriptions*

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

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

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

### *Gardening*

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

- *All items must be basic in nature.*
- *Only enough materials for one educational project are allowed per semester.*
- *Educational projects must be documented through learning samples and monitored by the ToR.*
- *Items like seeds, bulbs, and soil are allowed but must be basic in nature.*
- *Gardening tools may be ordered but cannot be sharp or dangerous to the student, and must be basic in nature.*



- *Additional items such as composters, sprouting trays, label sticks, and small pots may be ordered, but must be basic in nature.*
- *No items that students will wear, such as gloves or aprons, may be ordered.*
- *All equipment must be deemed fit for child educational gardening use.*
- *No furniture is allowed.*
- *No already grown plants are allowed -- seeds only.*
- *No potentially dangerous items such as weedkiller, insect repellent, or fertilizer.*



#### *LEGO® Education*

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

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

#### *Cancellation Policy*

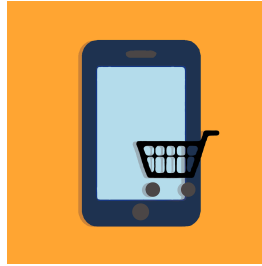
*We cannot cancel an EMR order after they are processed and sent to the Content Provider. Once materials are requested, the Student Services Department will order them and they cannot be canceled. If an order has not been processed and is still in "Pre-Pending Status," the parent can cancel or edit the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

*must be notified, by the parent or guardian, of cancellation prior to orders being canceled in OPS.*

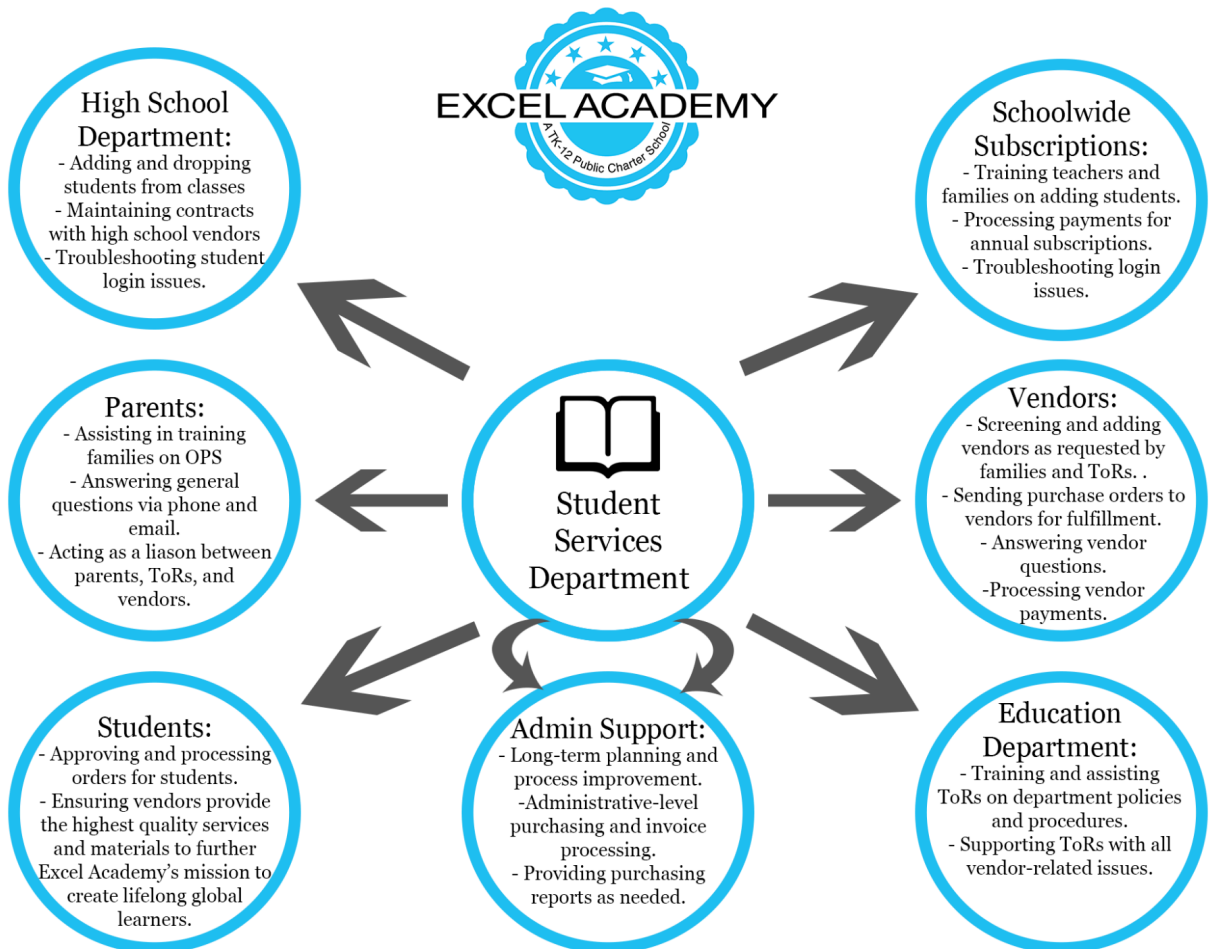
#### *Disallowed Educational Activities*

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

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



# ORDERING INSTRUCTIONS



## *Content & Community Provider (CCP) List Located on Website*

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

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

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

### *Glossary of Terms*

- *EMR: Educational Materials*
- *VCI: Educational Services*
- *OPS: Online Purchasing System. The system we use for ordering educational materials and services.*
- *Red notes: Individual guidelines for placing orders.*
- *Internal notes: Notes placed on orders after they have been created. Method for admin and teachers of record (ToRs) to communicate about a specific order.*
- *Consumable items: Items that (A) are under \$30 and/or (B) cannot be reused by another student. Examples of consumable items include: workbooks, pens, paper, pencils, printer ink, etc.*
- *Non-consumable items: Items that (A) are over \$30 and/or (B) can be reused by another student.*
- *Purchase order status terms:*
  - *Pre-Pending: Order has been placed by the parent and is pending review by the ToR.*
  - *Pending: ToR has carefully reviewed the order to ensure that the items or services being ordered correspond to Excel Academy guidelines and selected "Pending," OR the ToR has placed the order on behalf of the parent (orders placed by ToR are assumed to have been carefully reviewed).*
  - *Approved: Order has been reviewed and approved by the Student Services Department.*
  - *Processed: Order has been sent to the CCP for fulfillment.*
  - *Received Partial (EMR ONLY): ToR has indicated that some, but not all, of the items on the order have been received.*

- *Received Fully (EMR ONLY): ToR has indicated that all items on the order have been received.*
- *Invoice Matched: Student Services Department has received the invoice from the content or community provider and matched the order in OPS to match what the charge shows on the invoice.*

### **Content & Community Provider (CCP) Agreement**

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

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

### **ToR RESPONSIBILITY**

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

### **NON-CORE CURRICULUM ORDERING**

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

### **EMR ORDERS**

## Placing EMR Orders

To place an EMR (Educational Materials) order you must first review the order for content and appropriateness of educational material requests.

Look up each item on the provider's website and confirm the item number, description, cost and availability. You must verify that items do not contain religious content as well as the cost of the item.

**\*\*Please note:**

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

## Training video: [ToR EMR Training](#)

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

The screenshot shows the OPS dashboard interface. At the top, there are navigation tabs: SEARCHES, PURCHASING, DOCUMENTS, REPORTS, ONLINE HELP, CHANGE PASSWORD, and LOG OFF. The user is logged in as Tina Teacher. The dashboard is divided into several sections:

- Order Info Center:** A central section with a sub-section for **Pre-Pending Orders** (0 orders) and **Outstanding Orders** (0 processed, 0 received partial). A callout box explains that outstanding orders are those approved and processed by Student Services but not yet marked received in full by ToRs.
- Alerts:** A section on the right showing 113 alerts. A callout box instructs users to check order alerts, noting that some may come from Student Business Services and VCI orders from CCP.
- Student Inventories:** A section with a dropdown menu for 'Al Hajj Omar, Assem - 70012722' and a 'Select' button.
- Student Spending:** A bar chart at the bottom showing spending levels, with a prominent purple bar reaching approximately 300,000.

Callout boxes provide additional guidance:
 

- Searches Tab:** You can use this tab to look up a student and their orders.
- Purchasing Tab:** Use this tab to place orders.
- Pre-Pending Orders:** Orders placed by parents that need to be approved by ToRs.
- Outstanding Orders:** Orders that were approved and processed by Student Services and are yet to be marked Received In Full by ToRs.
- Alerts:** Check Order Alerts here. Some may come from Student Business Services and VCI orders may have alerts from CCP. Please respond to alerts at a timely manner.



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

Please use the form below to enter a purchase request into the system.

**Select Student:** Student, John - 0 EUs  **Date:** Apr 24, 2023

**Available Funds:**

**Student Totals**

Available:	\$0.00	Available funds are total funds available
Pending:	\$0.00	<< Totals do not include tax and shipping for the current request.
Net Balance:	\$0.00	Net Balance are funds remaining after Orders placed

Tax and shipping may apply (unless vendor has been designated as "pickup" or 0% tax rate).

**Requests:**

Type of Request	Vendor	Number of Items	Make Request Form
EMR Requests	Lookup   Select Vendor	8	Request
VCI Requests	Lookup   Select Vendor	1	Request
VCI Catalog Requests	Lookup   Select Vendor	-	Request
CC Requests	Lookup   Select Vendor	2	Request
COMPUTER/ISP/SOFTWARE Requests	Lookup   Select Vendor	4	Request
Shopping Cart	amazon	-	Request

Request Total (excluding tax and shipping). \$0.00

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

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

View site information - **Rainbow Resource Center [P]** (VENDOR NOTE: PLEASE Double check for religious materials! Especially LATIN & SCIENCE & HISTORY CURRICULUM! No-No List - Parachutes over 6ft. No Latin Primer, NO Visual Manna --i.e. Teaching History Through Art or Teaching English Through Art. No Latin Road to English Grammar, No Memoria Press, Apologia, Bob Jones University-Latin for Children-Classical Academic Press- Monarch, Ignitia, Switched-On Schoolhouse, Latins Not So Tough, LIFEPAK, The Weaver Curriculum, La Clase Divertida, Alpha Omega Science, Science in the Ancient World, Science in the Beginning, Memoria Press, Lift up your Eyes on High-Understanding the Stars, Climbing To Good English, Life of Fred books. Childs History of the World by V.M. Hillyer. Pathway Readers. Five-in-a-Row NOT VOL. 4 or the Christian character and Bible supplement. Grammar of Spelling ANY Learning Language Arts Through Literature or GREENLEAF PRESS MATERIALS NOT PERMITTED ie- Famous Men of the Renaissance and Reformation, etc. IEW Ancient History Based Writing Lessons and IEW Fables, Myths, and Fairy Tales Writing Lessons not permitted- No Homeschool In The Woods timeline books or curriculum, Notgrass America The Beautiful, Sign Language for Everyone, Singapore Math MUST be ordered through our Singapore Math vendor. Rainbow cant sell S.M. to Charter Schools - as per S.M.s request. Please check all Horizons items - some are not secular. Write shop ALLOWED items: WriteShop Primary Book A WriteShop Primary Book B WriteShop Primary Book C WriteShop Junior Book D WriteShop Junior Book E Blue Book of Grammar and Punctuation. YOU MUST ENTER THE 5 DIGIT RR NUMBER NOT THE ISBN NUMBER Reasons for Science )

Category	Item	Description	Consumable	Qty	Cost	Total
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$

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

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

Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Select Category			Y <input type="radio"/> N <input type="radio"/>	1	\$	\$
Request Total (from request page) \$ 1.00		Add to Request Saves, but does not submit				

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

1	Request
Request Total (excluding tax and shipping). \$1.00	

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

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

VCI Catalog Requests	Select Vendor ▼
COLLEGE COURSE Requests	Select Vendor ▼
COMPUTER/ISP/SOFTWARE Requests	Select Vendor ▼
ACTIVITY Requests	Select Subject ▼
<input type="button" value="Proceed to Checkout"/>	

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

<input type="button" value="Confirm Request"/> <input type="button" value="Delete Request"/>			
EMR Requests - Rainbow Resource Center [P] - V_ship is Ship			
Remove	Category	Item	Description
<input type="checkbox"/>	Math ▼	0000	TEST ITEM
EMR Requests - Amazon - V_ship is Ship			
Remove	Category	Item	Description
<input type="checkbox"/>	Language Arts ▼	0000	TEST ITEM
<input type="button" value="Update Order"/>			
<input type="button" value="Confirm Request"/> <input type="button" value="Delete Request"/>			

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

**Request Confirmed**

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

You requested the following items:

EMR Requests - Rainbow Resource Center [P] PO Number: <a href="#">263210704</a>						
Category	Item	Description	Con.	Qty	Cost	Total
Math	0000	TEST ITEM		1	\$ 1.00	\$ 1.00
						Total: \$16.08

EMR Requests - Amazon PO Number: <a href="#">263210705</a>						
Category	Item	Description	Con.	Qty	Cost	Total
Language Arts	0000	TEST ITEM		1	\$ 1.00	\$ 1.00
						Total: \$16.08

[Order Agreement Form](#) | [Email OA](#) | [Order More Materials](#) | [Add internal note](#) | [Add PO note](#)

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

*PO details:*

**ORDER SUMMARY**  
 Ordered under: **Guy StokleyTeacher**  
 Please use the form below to change an order's status.  
[alert admin](#)

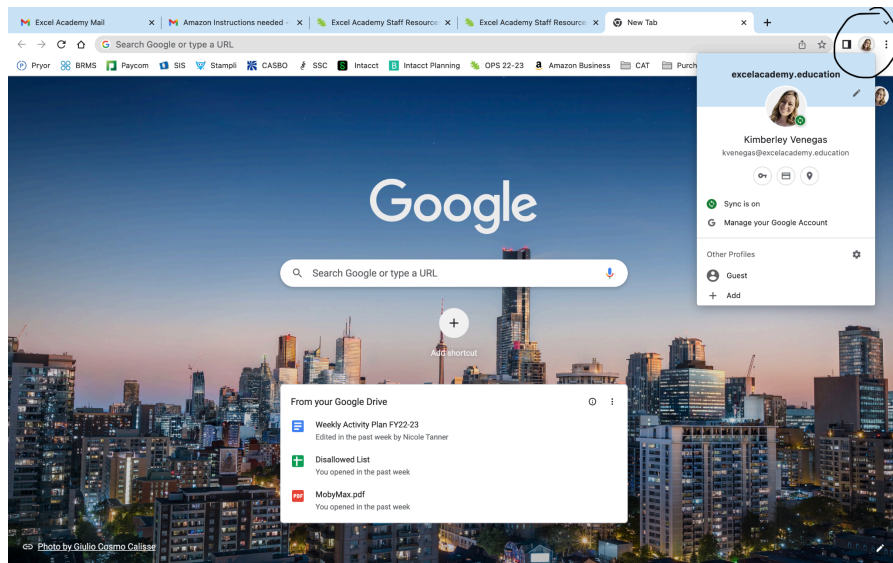
<b>Student</b>	Test Testson - Gr. emr	<b>Order Notes:</b>	<a href="#">Add internal note</a>   <a href="#">View/Add PO note</a>					
<b>Available EU's</b>	67.84							
<b>Vendor</b>	Rainbow Resource Center [P]							
<b>PO Number</b>	263210704 - Date Requested: 07-02-2019							
<b>Order Type</b>	EMR							
<b>Order Status</b>	Pending <input type="button" value="Update Order"/> <input type="button" value="Return To List"/>							
Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pending <input type="button" value="Update Order"/>	0000	TEST ITEM	Math	<input checked="" type="checkbox"/>	1	1.00	1.00
								<b>Tax:</b> 0.08
								<b>Shipping:</b> 15.00
Tax and shipping may change when invoice matched.								<b>TOTAL:</b> 16.08
<input type="button" value="Update Order"/> <input type="button" value="Return To List"/>								
<b>Invoice Info:</b>								
<input type="button" value="Duplicate Order"/>								

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

*How to place an Amazon Punchout Order*

First, you need to make sure they have their school issued email ending in "[@excacsstudent.org](mailto:excacsstudent.org)" with the corresponding password. If they need to reset the password because you do not have it, please contact Lauren Hansen or Alex Han (IT) to have it reset.

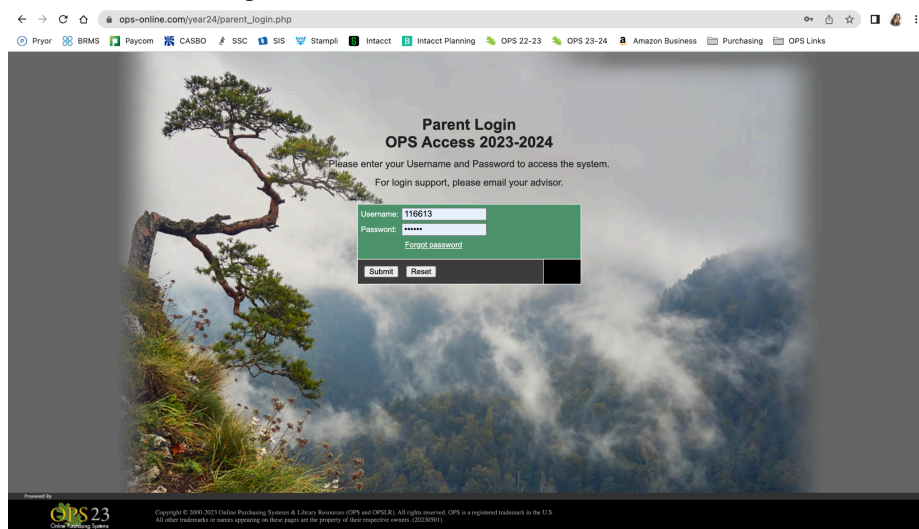
Once you have their email login credentials and OPS login information, please have them download Google Chrome and sign in to their Google Account in their web browser like it shows on this screenshot using their school email.



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

[https://www.ops-online.com/year24/parent\\_login.php](https://www.ops-online.com/year24/parent_login.php)

Then have them sign in to OPS.



Once Signed in to OPS -> Go to the Purchasing Tab , select the student and click the Amazon Icon, Request Button it will prompt you to a new page and follow these instructions.  
[Amazon Punchout Instructions Link](#)

## Rainbow Resource Punchout

1. Login to [OPS](#) portal.

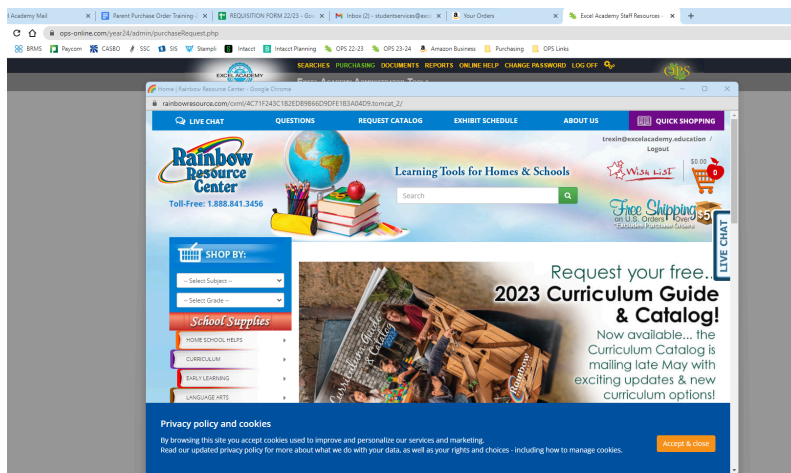
<https://www.ops-online.com/year24/excel/>

Parent - [https://www.ops-online.com/year24/parent\\_login.php](https://www.ops-online.com/year24/parent_login.php)

2. Click on the Purchasing Tab

The screenshot shows the 'Request Form' interface in the Excel Academy Administrator Tools. The form is titled 'Request Form' and includes a greeting 'Hello, Tina Teacher'. It contains several sections: 'Select Student' with a dropdown menu and a 'Date' field set to 'Jun 6, 2023'; 'Available Funds' with fields for 'Available', 'Pending', and 'Net Balance'; and a 'Requests' table. The table has columns for 'Type of Request', 'Vendor', 'Number of Items', and 'Make Request Form'. The rows are: EMR Requests (10 items), VCI Requests (1 item), VCI Catalog Requests, CC (2 items), and COMPUTER/IS/SOFTWARE Requests (4 items). At the bottom of the form, there are two 'Request' buttons: one for 'Amazon Punchout' and one for 'NEW!! Rainbow Resource Punchout'. A 'Proceed to Checkout' button is located at the very bottom of the form.

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



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

### Marking EMR Orders Received

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



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

<b>Student</b>	<a href="#">Test Testson</a> - Gr. emr	
<b>Available EU's</b>	51.76	
<b>Vendor</b>	Rainbow Resource Center [P]	
<b>PO Number</b>	263210704 - Date Requested: 07-02-2019	
<b>Order Type</b>	EMR	
<b>Order Status</b>	<div style="border: 1px solid black; padding: 2px;">                 Processed ▼                  Processed                  Received Full <span style="float: right;">Return To List</span>                  Received Partial             </div>	
<b>Line#</b>	<b>Status</b>	<b>Item</b>
1	Processed ▼	0000
Tax and shipping may change whe		
<input type="button" value="Update Order"/> <input type="button" value="Return To List"/>		
<b>Invoice Info:</b>		

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

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

*Approving EMR Orders Placed by Parent*

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

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

**ORDER SUMMARY**  
 Ordered under: **Guy StokleyTeacher**  
 Please use the form below to change an order's status.  
[alert admin](#) | [turn off alert](#)

**Student:** Test Testson - Gr. emr      **Order Notes:** [Add internal note](#) | [View/Add PO note](#)

**Available EU's:** 955.95

**Vendor:** Rainbow Resource Center [P]

**PO Number:** 263210760 - Date Requested: 07-03-2019

**Order Type:** EMR

**Order Status:** Pre-pending ▼  
 Update Order    Return To List

Line#	Status	Item	Description	Category	Consumable	Quantity	Unit Cost	Pending Cost
1	Pre-pending ▼	34092	Art Book	Art ▼	<input checked="" type="checkbox"/>	1	10.00	10.00
2	Pre-pending ▼	40938	Toy	Multi-Subject ▼	<input type="checkbox"/>	1	50.00	50.00
3	Pre-pending ▼	54921	Math Book	Science ▼	<input type="checkbox"/>	1	15.00	15.00
4	Pre-pending ▼	32981	J	Office/School Supp ▼	<input type="checkbox"/>	1	0.00	0.00

**Tax:** 5.81

**Shipping:** 15.00

**TOTAL:** 95.81

Tax and shipping may change when invoice matched.

Update Order    Return To List

Invoice Info:

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

Status	Item	Des
Pre-pending ▼	34092	Art Book
Pre-pending ▼	40938	Toy
Pre-pending	54921	Math Book
Pending		
<b>Canceled by Teacher</b>	32981	J

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

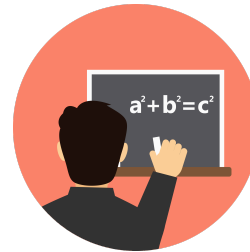
- These item descriptions are incomplete. All orders must have the full name of the product in order to be approved and processed. Full Description of items must be in the Description section.
- Line item 4 has an incomplete item description and price. Look up the item number on the Rainbow Resource website (or whichever vendor the order is for) and find the correct item. Update the item description and unit cost to the correct item and press "Update Order" at the bottom.
- It is also the ToR's responsibility to ensure that items are correctly marked as consumable or non-consumable.

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

### How to place a VCI order

Training video: [ToR VCI Training](#)

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



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

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

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

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

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

VCI Requests - TEST VENDOR (VENDOR NOTE: TEST VENDOR SET UP TO TEST THE VENDOR LOGIN)				
Category	Description	Month	Cost	Total
Math	Mathematics classes Tuesday and Thursday, start date 9/3	September to December	\$ 100	\$ 400.00
Request Total (from request page). \$ 400.00		Add to Request		

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

5. The months are divided into separate purchase orders. Community Providers have the option of being paid monthly or in a lump sum at the end of the class. If the community provider requested to be paid monthly, costs will be entered for each month. Check for accuracy and click "Add to Request."

\*\*If the student enrolls late and has a partial month of service please work with the CCP to figure out the pro-rated cost for a partial month of service.

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

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

Confirm Request Delete Request

**VCI Requests - TEST VENDOR**

Remove	Category	Description	Month	Cost	Total
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	September	100.00	100.00
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	October	100.00	100.00
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	November	100.00	100.00
<input type="checkbox"/>	Math	Mathematics classes Tuesday and Thursday	December	100.00	100.00
Update Order				Updated Total: 400.00	

Confirm Request Delete Request

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

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

Request Confirmed

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

You requested the following items:

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

[Order Agreement Form](#) | [Email OA](#) | [Order More Materials](#) | [Add internal note](#) | [Add PO note](#)

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

On the next screen, click "Send Document":

**EMAIL THIS DOCUMENT**

**Reply To Email Address:**

test@ops-online.com

**Please enter a valid address to send this document to:**

test@OPSLR.COM

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

**Email Subject:**

Important document regarding student Test Testson of Community Collaborative Charter Schools<br>

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

It can be viewed at  
https://www.ops-online.com/cgi-bin/year20/teacher/edmat\_agreement.pl?  
request\_id=8888test3210764

Send Document

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

*Purchasing Online Courses*

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

*Internal Notes*

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

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

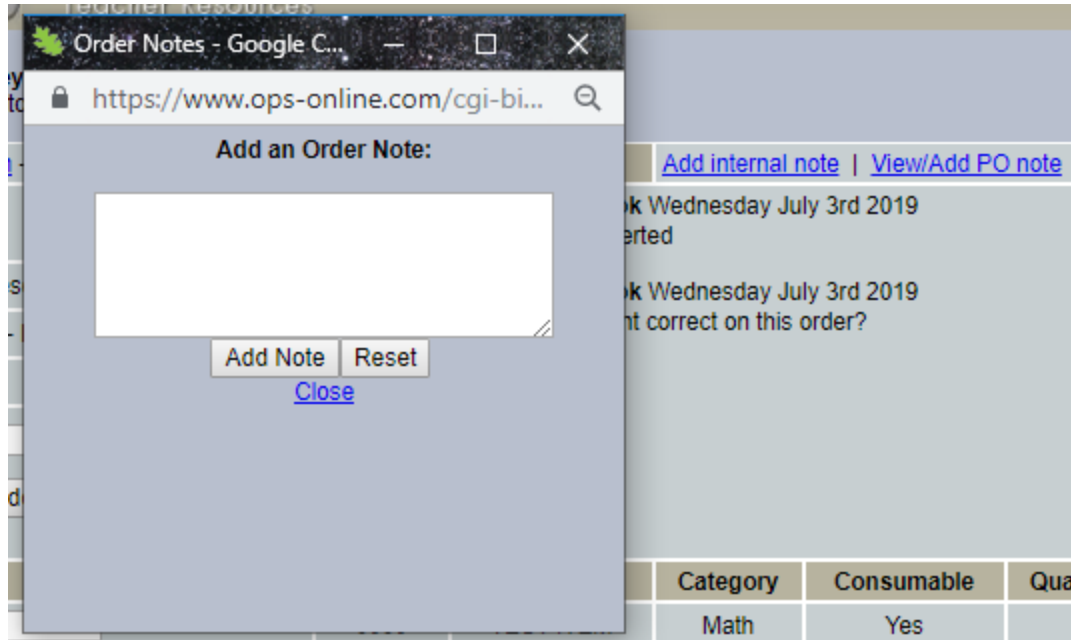
**ORDER SUMMARY**  
 Ordered under, **Guy StokleyTeacher**  
 Please use the form below to change an order's status.  
[alert admin](#) | [turn off alert](#)

<b>Student</b>	Test Testson - Gr. emr		<b>Order Notes:</b> <a href="#">Add internal note</a>   <a href="#">View/Add PO note</a>					
<b>Available EU's</b>	555.95		Charles McCook Wednesday July 3rd 2019 Teacher was alerted					
<b>Vendor</b>	Rainbow Resource Center [P]		Charles McCook Wednesday July 3rd 2019 Hi, is the amount correct on this order?					
<b>PO Number</b>	263210704 - Date Requested: 07-02-2019							
<b>Order Type</b>	EMR							
<b>Order Status</b>	Processed ▾							
	<input type="button" value="Update Order"/> <input type="button" value="Return To List"/>							
<b>Line#</b>	<b>Status</b>	<b>Item</b>	<b>Description</b>	<b>Category</b>	<b>Consumable</b>	<b>Quantity</b>	<b>Unit Cost</b>	<b>Pending Cost</b>
1	Processed ▾	0000	TEST ITEM	Math	Yes	1	1.00	1.00
							<b>Tax:</b>	0.08
							<b>Shipping:</b>	15.00
Tax and shipping may change when invoice matched.							<b>TOTAL:</b>	16.08
<input type="button" value="Update Order"/> <input type="button" value="Return To List"/>								
<b>Invoice Info:</b>								

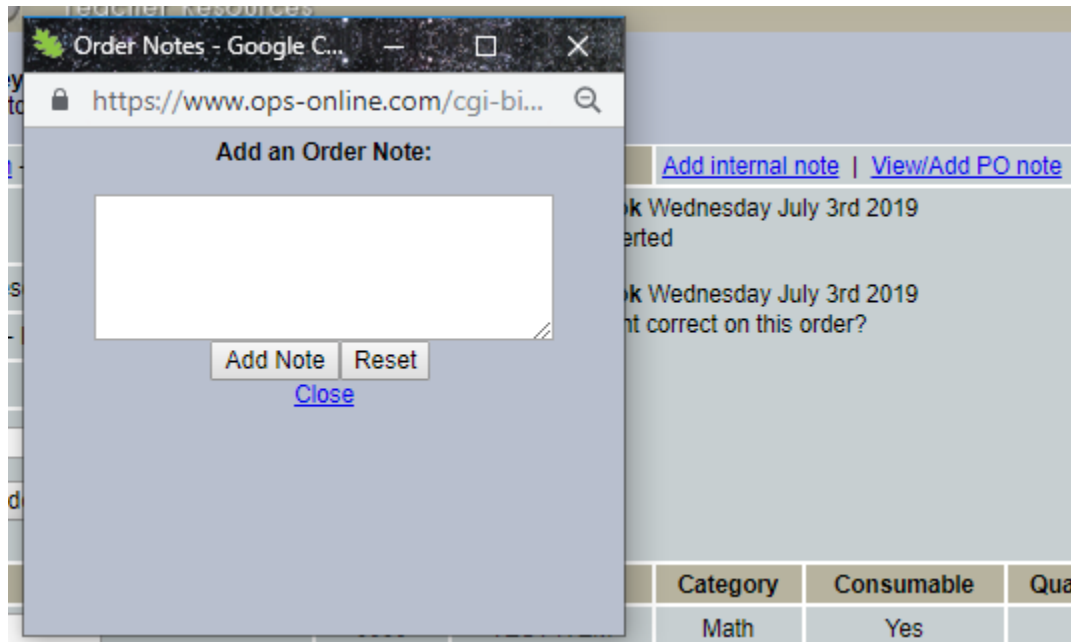
3. Click on "Add Internal Note."

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





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



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

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

<b>Student</b>	<a href="#">Test Testson</a> - Gr. emr	<b>Order Notes:</b>	<a href="#">Add internal note</a>   <a href="#">View/Add PO note</a>			
<b>Available EU's</b>	555.95	<b>Guy StokleyTeacher</b> Wednesday July 3rd 2019 Admin was alerted				
<b>Vendor</b>	Rainbow Resource Center [P]	<b>Guy StokleyTeacher</b> Wednesday July 3rd 2019 No. I will update.				
<b>PO Number</b>	263210704 - Date Requested: 07-02-2019	<b>Charles McCook</b> Wednesday July 3rd 2019 Teacher was alerted				
<b>Order Type</b>	EMR	<b>Charles McCook</b> Wednesday July 3rd 2019 Hi, is the amount correct on this order?				
<b>Order Status</b>	Processed ▾ <input type="button" value="Update Order"/> <input type="button" value="Return To List"/>					
Line#	Status	Item	Description	Category	Consumable	Quantity
1	Processed ▾	0000	TEST ITEM	Math	Yes	1

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

*Searching for Orders*

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

Orders	
Combination Search ...	Choose Status ▾ <input type="button" value="Search"/>
Status:	Choose Type ▾
Type:	Select Vendor
Vendor:	
Select Student:	Select Student ▾ <input type="button" value="Select"/>
P.O. Number:	Select Student Testson, Test - test <input type="text"/> <input type="button" value="Search"/>
View Teacher Inventory:	<input type="button" value="View Teacher Inventory"/>
View Student Inventory:	<input type="button" value="View All Student Roster Inventory"/>

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

**Orders Search**  
Your search has returned 7 results.

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

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

**Orders**

Combination Search ...

Status: Choose Status ▾ Search

Type: Choose Type ▾

Vendor: Select Vendor

---

Select Student: Select Student ▾ Select

P.O. Number:  Search

View Teacher Inventory: View Teacher Inventory

View Student Inventory: View All Student Roster Inventory

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

Training video: [ToR Order Search Training](#)

## Content & Community Provider-Specific Order Instructions

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

- Amazon
- ASTEME Learning Center
- Staples
- Start ASL
- Teachers Pay Teachers
- Time4Writing
- Urban Workshop

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

## Transferring Funds Between Siblings

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

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

Student Budget Transfer Request:	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="text" value="From Student"/> </div> <div style="width: 5%; text-align: center;">▼</div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="text" value="To Student"/> </div> <div style="width: 5%; text-align: center;">▼</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 45%;">Amount: \$ <input type="text"/></div> <div style="width: 50%; text-align: right;">Request Budget Transfer</div> </div>
Funding Drop Request:	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="text" value="For Student"/> </div> <div style="width: 5%; text-align: center;">▼</div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 45%;">Amount: \$ <input type="text"/></div> <div style="width: 50%; text-align: right;">Request Funding Drop</div> </div>

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

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

Community Collaborative Charter Schools  
on behalf of Excel Academy  
Transfer Funds from One Student to Another

Transfer \$10  
From Test Testson - test (\$555.95)  
To PAYMENT BATCH - 11 (\$0.00)

Manual adjustment notes to be added to both students:

The BusinessServices Department will review the request and decide whether to approve or deny. ALL REQUESTS WITHOUT EXPLANATIONS WILL BE DENIED.

Fund transfers between siblings must be for:

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

### Instructional Funds Amounts

#### Personalized Path

TK-8th \$3,400

High School \$3,900



The IFs are disbursed in multiple allotments:

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

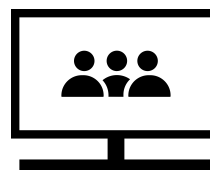
High School \$1,950 in August and \$1,950 in November

#### Virtual Path

1st - 8th \$2100

The IF's will be disbursed in multiple allotments:

1st - 8th \$1050 in August, \$1050 in November



Disallowed Items

Please refer to the [“Ordering Guidelines” Google Doc](#) for a detailed list of allowed/disallowed items. It is available on the website.

Returning Materials

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

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

Orders	
Combination Search ...	Choose Status ▾ Search
Status:	Choose Type ▾
Type:	Select Vendor
Vendor:	
Select Student:	Select Student ▾ Select
P.O. Number:	<input type="text"/> Search
View Teacher Inventory:	View Teacher Inventory
View Student Inventory:	View All Student Roster Inventory

Staying Within Budget

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

No Out of Pocket Payments

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

Basic Materials Only

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

Cancellation Policy

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

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

**ORDER SUMMARY**  
 Ordered under, **Guy Stokley**Teacher  
 Please use the form below to change an order's status.  
[alert admin](#) | [turn off alert](#)

<b>Student</b>	Test Testson - Gr. emr		<b>Order Notes:</b>
<b>Available EU's</b>	555.95		
<b>Vendor</b>	Rainbow Resource Center [P]		
<b>PO Number</b>	263210760 - Date Requested: 07-03-2019		
<b>Order Type</b>	EMR		
<b>Order Status</b>	<div style="border: 1px solid black; padding: 2px;">                 Pre-pending ▼                  Pre-pending                  Pending                  Canceled             </div> <input type="button" value="Return To List"/>		
<b>Line#</b>	<b>Status</b>	<b>Item</b>	
1	Pre-pending ▼	34092	Art Book
2	Pre-pending ▼	40938	Toy
3	Pre-pending ▼	54921	Math Book
4	Pre-pending ▼	32981	J

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



### Backordered items

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

### Ordering Deadline

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

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

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

### Computers

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

*Other Questions*

*For other questions, please read the materials in the Student Services Department Ordering Instructions folder in the Shared Drive and the [ToR FAQ](#).*

# Virtual Path

## Grade Level Classrooms:

*First Grade: Kristen Stawniczy*

*Second Grade: Kaylee Khaki*

*Third Grade: Heather Craven*

*Fourth Grade: Lori Levine*

*Fifth Grade A: Tamara Rexin*

*Fifth Grade B: Tiffany Young*

*Sixth Grade: Shondra Rogers*

*7th Grade: James Owens (Teaches Math/Science for Junior High)*

*8th Grade: Joanie Stubbs (Teaches History/English for Junior High)*

*7th Grade Essentials: Kelsey Lima (Teaches History/English Essentials for JH)*

*8th Grade Essentials: Frank Filipponio (Teaches Math/Science Essentials for JH)*

Link to [Virtual Teacher Contacts/Google Classrooms](#)

## VP Weekly Learning Schedule

### 1st & 2nd Grade Schedule

Monday 8:15-10 AM	Tuesday 8:15-11:45 AM	Wednesday 8:15-11:45 AM	Thursday 8:15-11:45 AM	Friday 8:15-10 AM
8:15-10:00 Math & ELA	8:15-9:00 ELA Whole group	8:15-9:00 ELA Whole group	8:15-9:00 ELA Whole group	8:15-10:00 Math & ELA
	9:00-9:15 ELA Group A	9:00-9:15 ELA Group A	9:00-9:15 ELA Group A	
	9:15-9:30 ELA Group B	9:15-9:30 ELA Group B	9:15-9:30 ELA Group B	
	9:30-9:45 Spelling/ Handwriting	9:30-9:45 Spelling/ Handwriting	9:30-9:45 Spelling/ Handwriting	
8:15-11:45 AM	9:45-10:00 BREAK	9:45-10:00 BREAK	9:45-10:00 BREAK	8:15-11:45 AM
	10:00-10:45 Math	10:00-10:45 Math	10:00-10:45 Math	
	10:45-11:00 BREAK	10:45-11:00 BREAK	10:45-11:00 BREAK	
	11:00-11:45 Science/Social Studies	11:00-11:45 Science/Social Studies	11:00-11:45 Science/Social Studies	
	Independent Study	Independent Study	Independent Study	

\*\*\*Please note: While the main class schedule ends at 11:45 pm, students will be required to complete independent work outside of class hours and may have intervention requirements that fall outside of the bell schedule listed above.

### 3rd-5th Grade Schedule

<i>Monday 8:15-10 AM</i>	<i>Tuesday 8:15-11:45 AM</i>	<i>Wednesday 8:15-11:45 AM</i>	<i>Thursday 8:15-11:45 AM</i>	<i>Friday 8:15-10 AM</i>
<i>8:15-10:00 Math &amp; Reading</i>	<i>8:15 - 9:30 ELA</i>	<i>8:15 - 9:30 ELA</i>	<i>8:15 - 9:30 ELA</i>	<i>8:15-10:00 Math &amp; Reading</i>
	<i>9:30 - 9:45 BREAK</i>	<i>9:30 - 9:45 BREAK</i>	<i>9:30 - 9:45 BREAK</i>	
	<i>9:45-10:30 Math</i>	<i>9:45-10:30 Math</i>	<i>9:45-10:30 Math</i>	
	<i>10:30 - 10:45 BREAK</i>	<i>10:30 - 10:45 BREAK</i>	<i>10:30 - 10:45 BREAK</i>	
	<i>10:45-11:15 Science</i>	<i>10:45-11:15 Science</i>	<i>10:45-11:15 Science</i>	
	<i>11:15- 11:45 Social Studies</i>	<i>11:15- 11:45 Social Studies</i>	<i>11:15- 11:45 Social Studies</i>	
	<i>Independent Study</i>	<i>Independent Study</i>	<i>Independent Study</i>	

*\*\*\*Please note: While the main class schedule ends at 11:45 pm, students will be required to complete independent work outside of class hours and may have intervention requirements that fall outside of the bell schedule listed above.*

### 7th and 8th Grade Schedule

M/F: 8:00 AM-10:00 AM (Early Out)

Monday 8-10 AM	Tuesday 8AM-12PM	Wednesday 8AM-12PM	Thursday 8AM-12PM	Friday 8-10 AM
8:00-9:00 English 7 & 8	8:00-9:00 Science 7 ----- English 8	8:00-9:00 Science 7 ----- English 8	8:00-9:00 Science 7 ----- English 8	8:00-9:00 Math 7 & 8
9:00-10:00 Math 7 & 8	9:00-10:00 Math 8 ----- Social Studies 7	9:00-10:00 Math 8 ----- Social Studies 7	9:00-10:00 Math 8 ----- Social Studies 7	9:00-10:00 Study Hall (Required)
Independent Study	10:00-11:00 English 7 ----- Science 8	10:00-11:00 English 7 ----- Science 8	10:00-11:00 English 7 ----- Science 8	Independent Study
	11:00-12:00 Math 7 ----- Social Studies 8	11:00-12:00 Math 7 ----- Social Studies 8	11:00-12:00 Math 7 ----- Social Studies 8	
	12:00-1:00 Lunch & Clubs (Optional)	12:00-1:00 Lunch & Clubs (Optional)	12:00-1:00 Lunch & Clubs (Optional)	
	Independent Study/Electives	Independent Study/Electives	Independent Study/Electives	

T/W/Th 8:00 AM-12:00 PM

(\*Optional Clubs and Electives in the afternoon)

*\*\*\*Please note: While the main class schedule ends at 12:00 pm, students will be required to complete independent work outside of class hours and may have intervention requirements that fall outside of the bell schedule listed above.*





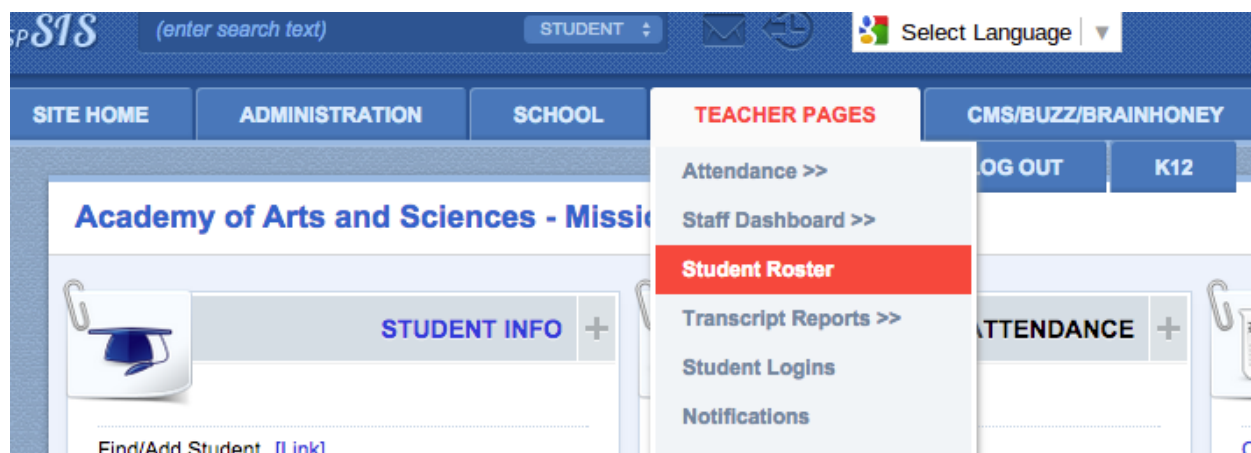
## How to Access Student Roster in SIS

LOGINS for SIS scopes

<https://excelcs.plsis.com/mod.php/login.php> For students in "ExcelCS " Scope

<https://exceleast.plsis.com/mod.php/index.php> For students in "ExcelEast" Scope

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



The student roster will appear. Check to see that the correct dates and semester are showing at the top. If the date needs adjusting, make sure to click "Update" (under the first large blue and white box) after the date and/or semester has been changed. To print a roster, click "Print/Export" under the first large blue and white box.

### ToR Roster in SIS

#### Enrollment status and Additional Information

Each time the enrollment team assigns a student to a ToR after school begins, the student will be highlighted in **RED** in the PLS/Student Roster portion of the teacher's roster. This notifies the ToR that the student has been added, but still needs to verify the exit date of when they withdrew from their previous school. They can verify this date by having the parent send their ToR an email stating the date they withdrew from [list name of previous] school. The ToR needs to forward this email to [admissions@excelacademy.education](mailto:admissions@excelacademy.education). The student will NOT be able to start school until the day they turn in their withdrawal email verification to our admissions clerk and are not fully enrolled in our school. A finalized master agreement is what finalizes their enrollment. ToRs should communicate this to a new family. Additionally, most secondary students need an unofficial transcript before MAs can be created ([please see below](#)).

Once admissions has received exit date verification, or if it is before the first day of the school year, the student will be given a pre-enroll date and they will show up in the ToR SIS roster in **BLUE**. This indicates that the MA is ready to be prepared and sent to the family for signature. (Note: Every student will show up in **BLUE** before the school year starts. We do not need withdrawal verification before the first day of school 08/28/2023)

When the MA has been signed and approved, the student will show up in **GREEN** on the SIS roster. The student in green is now active in school and will acquire attendance.

Attendance Forms													
Form #9f - LP 1, Track C													
Printed													
6 Student(s)													
<a href="#">[View]</a> <a href="#">[Edit]</a>													
#	Mig?	St #	LocalID	Name	Grd	Track	Street	City	Zip	Phone	Birthdate	Counselor Oversight	
<input type="checkbox"/>	▶	1609505741	10142	Anderson, Yohan	2	C	26 San Nicholas	Rancho Santa Margarita	92688	(949) 636-0281	07/06/2009	Grad Data	Send E-mail
<input type="checkbox"/>	▶	2575118788	10366	Crawford, Ezekiel	7	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	03/31/2004	Grad Data	Send E-mail
<input type="checkbox"/>	▶	8638905058	10545	Crawford, Stephen	11	C	27331 Viana	Mission Viejo	92692	(949) 367-0937	09/14/1999	Grad Data	Send E-mail
<input type="checkbox"/>	▶	2631450925	10524	Hsu, Kaitlyn	10	C	15642 Sand Canyon Ave. #50506	Irvine	92619		08/02/2002	Grad Data	Send E-mail
<input type="checkbox"/>	▶	7988545866	10226	Hsu, Micah	5	C	15642 San Canyon Ave. #50506	Irvine	92619	(949) 285-8690	02/24/2007	Grad Data	Send E-mail
<input type="checkbox"/>	▶	9904208613	10368	Hsu, Nathan	7	C	15642 San Canyon Ave. #50506	Irvine	92619	(949) 285-8690	11/23/2004	Grad Data	Send E-mail
<input type="checkbox"/>	-		11635	Roberts, Raquel			73 Cottage Ln	Aliso Viejo	92656	(949) 374-0771	02/02/2002	Grad Data	Send E-mail
<input type="checkbox"/>	▶		11442	Student, John	10	C	123 First Street	Vista	92081		01/01/2000	Grad Data	Send E-mail
<input type="checkbox"/> Check All													
<a href="#">Email Selected Students</a>							<a href="#">Labels for Selected Students</a>						

Note that the ToR can see the student's full name, birthdate, and contact information in each stage.

The ToR will now be able to see all the necessary information to make initial contact with all of their families.

**RED-** Do Not Enroll-Parent needs to send enrollment verification of the exit date of when they withdrew from their previous school. Parents may send ToR an email stating the date they withdrew from (name of) school. Upon receipt ToR sends the email to admissions and registrar. Please see below for Prospective Student Contact instructions.

All incoming secondary students must submit their academic records including an unofficial transcript and report card in order to process the Course of Student and create the MA. The only exception is for foster, homeless (McKinney Vento) youth - these students must be enrolled immediately. ToRs should remind families to submit these. They may email the ToR or send to the Registrar - registrar@excelacademy.education.

**BLUE-** Enroll! MA is ready to be sent to the parent for signature. It's in the student's best interest for the parent to sign and return the MA the day they first receive it so as not to lose any funding. However, ensure that you follow the procedures laid out for contacting families and that they understand the responsibilities of the parent before you send the MA. [All new-to-Excel Secondary students MUST meet with their counselor to have their MA written.](#)

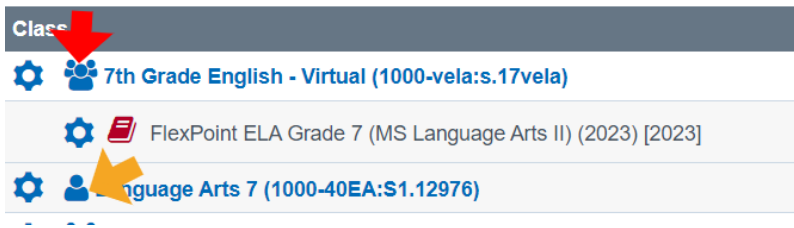
**GREEN-** You did it! You have successfully enrolled your student with Excel Academy.

## How to Add Student Courses in SIS

*(High School and JH students taking high school-level courses only)*

Before the beginning of the school year, ToRs must add high school courses in SIS for returning 7th-12th graders and for honors Junior High classes. TK - 8th grade students, including Virtual Path, will have their courses loaded for them. If a TK-8th grade student is missing their preloaded courses add their names and the needed information onto the [TK-12 Missing Students Classes/Curriculum](#) doc. All Tk-8 students, except for the Virtual Path, should have five classes for their grade level: math, language arts, science, social studies and PE.



Virtual Path students will show classes, but they will be CMS classes (multiple heads next to the class title in the PLS roster-see red arrow in screenshot below vs PLS class marked by yellow arrow). Virtual Path students in 1st-6th grade will have only one class added-the grade level classroom title. (Example: "Virtual First Grade Classroom") 7th and 8th grade Virtual Path students will have English, Math, Science, Social Studies & PE classes visible for each student.

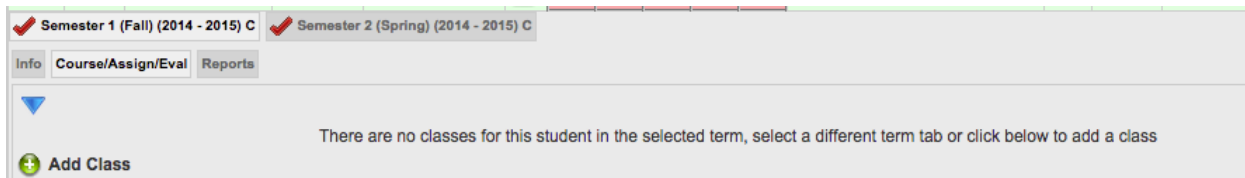


If you need to add an advanced curriculum for 5th or 6th graders, please use the instructions below. If you need to add a HS course for an [advanced 7th or 8th grader](#), please use the instructions in the linked bookmark. Upon approval, junior high students may enroll in a high school math and/or world language course.

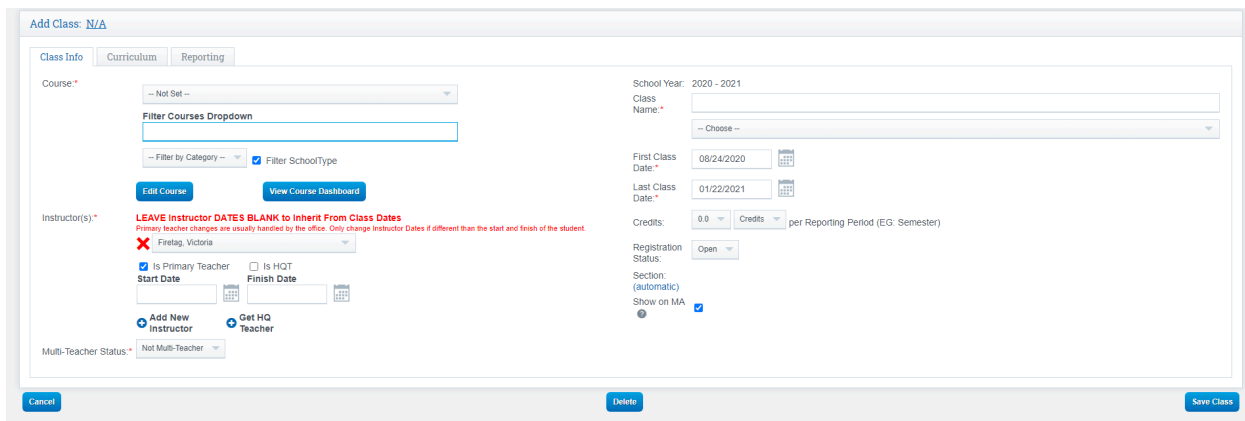
High school courses for both semesters need to be added at the beginning of the year to create the Master Agreement. Consult the [High School Course Catalog](#) for course descriptions, codes, for prerequisites. Please watch this video for [Adding Classes to SIS](#) before creating a master agreement.

Instructions:

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



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



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

### How to Create a Master Agreement

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

*The MA lists all of the courses that a student is attempting during the school year. For the Personalized Path, TK-6th grades students will have courses loaded automatically by the back office. ToRs will add classes for 7th through 12th grade students. In the Virtual Path, all classes will be added by the back office. 1st-6th grade Virtual Path students will show only one CMS class on the Master Agreement (Example: "Virtual First Grade Classroom") 7th and 8th grade Virtual Path students will have five CMS classes added to the MA (Example: "English 7 Essentials")*

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

*Dates and signatures on a master agreement are very important:*

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

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

#### Resources

[How to Create a Master Agreement- video](#)

[Step-by-Step directions for TK-8 paper](#)

[Step-by-Step directions for HS- paper](#)

Signed MA's bridge with the ordering system overnight.

## How to Add Curriculum Content to a Course in SIS


Curriculum content must be added to all classes. Curriculum content is the scope and sequence of the course in the form of lists of objectives/standards and assignments associated with textbooks, classes, or the state standards. Curriculum content can be added at any point and is not needed prior to sending the MA. Some TK-8 curriculum content will be pre-populated when classes are added. Please see the High School 10-Day Add/Drop Deadline for changing and adjusting curriculum.

Virtual Path-The AWRs for your classroom are completed prior to the school year beginning based on the class pacing in Buzz. The assignments should exactly match the assigned work in Buzz. Any AWR completed for a student in a CMS class is automatically copied to all students enrolled in the class.

Please watch these helpful videos and read the directions below:

[Introduction to Curriculum Content](#)

[Adding Curriculum Content to Courses in SIS](#)

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

Edit Class: English 12 A

Class Info | **Curriculum** | Merge | Reporting | CC Class To Students

---

**Class Curricula**

Local ID	Name	Owner	Category	Preview	Weight
<input checked="" type="checkbox"/> 1859	EXCEL CO - ENGLISH 12 [XL26] [1920]	Coon, Erika	Language Arts	<a href="#">View</a>	33.33% 1
<input checked="" type="checkbox"/> 3818	CP English 12 A/B	Haas, Amanda	Language Arts	<a href="#">View</a>	33.33% 1
<input checked="" type="checkbox"/> 2179	<input type="text" value=""/> British Literature: Heroes, Monsters, Fairies, and Kings - Oak Meadow [1920]	Coon, Erika	Language Arts	<a href="#">View</a>	33.33% 1

---

**Add Curriculum** Clear

Grade: 12 | Range: exccics | Category: Language Arts | Text Search: Oak meadow

Imported ID	Name	Owner	Category	Preview
<input checked="" type="checkbox"/> 2179	British Literature: Heroes, Monsters, Fairies, and Kings - Oak Meadow [1920]	Coon, Erika	Language Arts	<a href="#">View</a>
<input type="checkbox"/> 2587	British Literature - Oak Meadow	Coon, Erika	Language Arts	<a href="#">View</a>
<input type="checkbox"/> 2351	Oak Meadow English 9 [1920]	Coon, Erika	Language Arts	<a href="#">View</a>
<input type="checkbox"/> 2808	Oak Meadow Literature and Composition II C: 2009	Hernandez, Amy	Language Arts	<a href="#">View</a>

Cancel Delete Save Class

3. *Use the filters to find the correct curriculum and click the box next to the desired curriculum content to add it. You may add a single or multiple curricula to any TK-12 course to individualize the student's record.*
  - a. *Always add the standards to TK-8 courses, in addition to any specific textbook-based curriculum content, so you can use them when students work on teacher-created assignments or curriculum that is not in SIS.*
  - b. *For high school a-g courses, you must use the CP curriculum content as the default if the specific curriculum for the CCP or textbook is not in SIS.*
4. *For additional detailed information about choosing appropriate curriculum, see the section [How to Complete AWRs](#).*

### *How to Create an Addendum*

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

- *A transfer of a student to a new ToR*
- *An update to the student's classes (adding or changing a class)*
  - *Addendums are not needed when a student drops a class.*
- *Adding an additional parent or guardian signatory*
- *Changing the student's grade level*

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

*Addendums are only created after the first day of instruction. If an adjustment is needed prior to the first day of instruction a new MA is created. The teacher, parent, and student will all sign the addendum. Teachers will need to add the parent email to one of the "other" spaces, as there is no designated space for the parent to sign on the MA Addendum.*

*Please see the [High School 10-Day Add/Drop Deadline](#) for changing and adjusting curriculum before creating an addendum for high school students. Remember to include a parent and the student for signature.*

*Resources:*

*[How to create and save an addendum](#)*

### *How to check Grid Logs for Engagement*

*How to check grid logs for a single student:*

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



3. Choose the 'reports' tab.

Learning Period	Attendance	Work Summary	AWR	Learning Logs
[1] 08/26/2021 - 09/17/2021				
[2] 09/20/2021 - 10/15/2021				
[3] 10/18/2021 - 11/12/2021				
[4] 11/15/2021 - 12/10/2021				
[5] 12/13/2021 - 01/14/2022				

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

How to check grid logs for your entire roster:

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

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1						
LP: 2						
LP: 3						
LP: 4						
LP: 5						

Learning Period	Attendance	Work Summary	AWR	Learning Logs
[1] 08/26/2021 - 09/17/2021				
[2] 09/20/2021 - 10/15/2021				
[3] 10/18/2021 - 11/12/2021				
[4] 11/15/2021 - 12/10/2021				
[5] 12/13/2021 - 01/14/2022				

3. A box will open. In this box choose "grid log check" and 'print logs'

The screenshot shows a web application interface for generating grid logs. It features several dropdown menus and checkboxes. The 'Schoolyear' dropdown is set to '2021 - 2022'. The 'Log Type' dropdown is set to 'Grid Log - Check'. The 'Report Title' dropdown is set to 'Student Learning Log'. The 'Select Learning Periods' dropdown is set to 'Track: B LP 5 (15 days: 12/13/2021 - 0...'. Under 'Print Signature Lines', the checkboxes for 'Parent', 'Student', and 'Teacher' are all checked. Under 'Other Options', the checkboxes for 'Hide Printed Calendar' and 'Print in Landscape' are unchecked. At the bottom, there are two buttons: 'Print Logs' and 'Archive Logs'.

- This will load all grid logs for your entire roster. Check if they are current and make contact with those parents that are not. [Follow the re-engagement procedure if they are not current](#). If you need to make changes to the grid log to reflect student engagement as dictated by the parent, use the instructions above for *How to check grid logs for a single student*.

### *How to Use the Engagement Calendar (Virtual Path)*

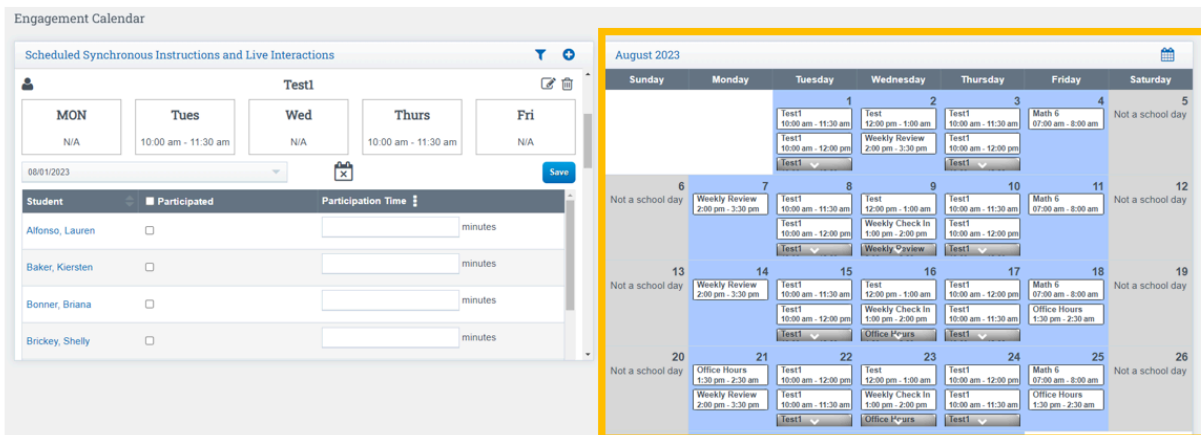
For teachers in the Virtual Pathway, daily attendance is tracked using the Engagement Calendar.

Taking attendance in the Engagement Calendar will mark students as attended on the Engagement Log.

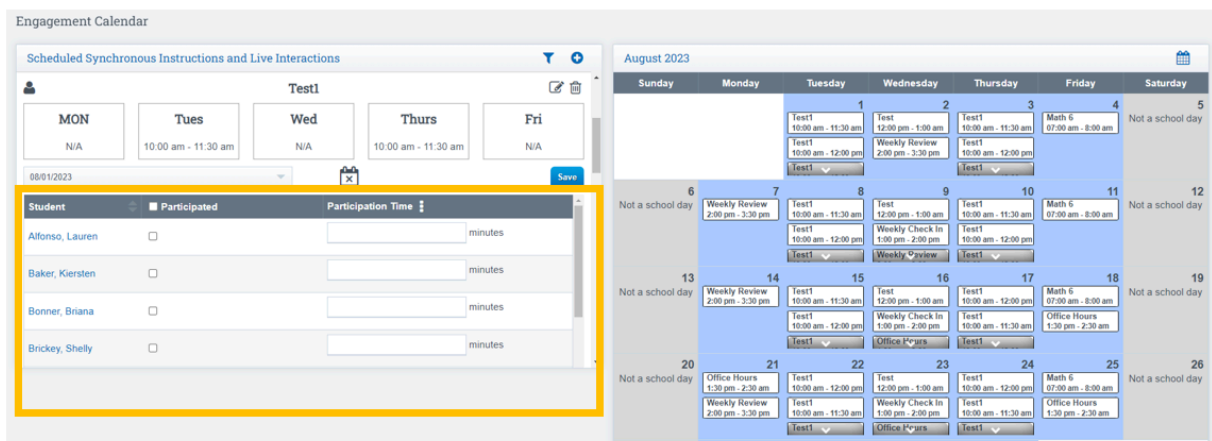
Navigation:

Teachers > Engagement > Engagement Calendar

On the right side of your screen locate the class you want to take attendance for and click on the class name in the calendar.



1. Left side of screen, all students enrolled in the class will appear on the screen,
2. Place a checkmark in the box next to the name of each student who attended.
3. Click "Save"



*CMS Classes that have been used to create Synchronous Instructions can now use attendance tracking from the CMS class to count as participation for the linked Synchronous Instruction.*

To access the Engagement log return back to your Roster.

- Click "PLS/Student Roster"

The screenshot shows the Milestone Academy dashboard. The navigation menu is open, and 'PLS/Student Roster' is highlighted. The main content area displays a calendar for October 2022 with a grid of class activities. The footer shows the user is logged in as 'Excel Academy' on 10/13/2022.

Click "Mass Print Reports"

The screenshot shows the 'Student Roster' page. The 'Summary' section has 'Mass Print Reports' highlighted. Below this is a table showing 18 students with columns for Name, Local ID, Grade, AL, Student Activity, Special Needs, Parent, Track, Street, City, Zip, Phone, Cell, Birthdate, and Email.

#	Name	Local ID	Grade	AL	Student Activity	Special Needs	Parent	Track	Street	City	Zip	Phone	Cell	Birthdate	Email
1	Abercrombie, Teresa	78924	UU					A	181 Commercial St.	Portola	96122			02/15/2010	
2	Anderson, Christan	78682	UU					A	1900 West Pintail Way	Portola	96122	(805) 555-1234		10/21/2010	

Click "Engagement Logs"

Learning Period	Attendance	Work Summary	AWR	Activity Logs	Learning Logs	Engagement Logs	Progress By LP	Work Samples
[1] 07/01/2022 - 07/26/2022	<input checked="" type="checkbox"/>							
[2] 08/01/2022 - 08/26/2022	<input checked="" type="checkbox"/>							
[3] 08/29/2022 - 09/23/2022	<input checked="" type="checkbox"/>							
[4] 09/26/2022 - 10/28/2022	<input checked="" type="checkbox"/>							
[5] 10/31/2022 - 12/02/2022	<input checked="" type="checkbox"/>							
[6] 12/05/2022 - 01/13/2023	<input checked="" type="checkbox"/>							

In the filter section, click the LP you wish to view.

The screenshot shows the 'Engagement Logs' page. In the 'Filter Options' section, 'Staff' is set to 'Porter, Ashley' and 'School Year' is '2022 - 2023'. A 'School Week' dropdown menu is open, showing a list of dates from 07/01/2022 to 09/27/2022. Below this, there are 'Opportunity Requirements' for TK-3, 4-8, and 9-12. The main section is 'Student Interactions: Week of 10/30/2022 - 11/05/2022'. It features a grid with columns for days of the week (Sunday to Saturday) and rows for individual students. For 'Abercrombie, Teresa', there are blue checkmarks in the Monday, Tuesday, Wednesday, and Thursday columns, indicating attendance. The grid also shows various interaction types like 'Live Interaction', 'Synchronous Instruction', and 'Academic Progress' for each day.

You will see Blue Check Marks next to the students for whom you took attendance for on the screen.

Name	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		<input type="checkbox"/> Academic Progress	<input type="checkbox"/> Academic Progress	<input type="checkbox"/> Academic Progress	<input type="checkbox"/> Academic Progress	<input type="checkbox"/> Academic Progress	
Atkins, Jordan	10/02/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day	10/03/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/04/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/05/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/06/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/07/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/08/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day
Brown, Michael	10/02/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day	10/03/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/04/2022 LP 4 (09/26/2022 - 10/28/2022) <input checked="" type="checkbox"/> Live Interaction <input checked="" type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/05/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/06/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/07/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/08/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day
Disney, Mini	10/02/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day	10/03/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/04/2022 LP 4 (09/26/2022 - 10/28/2022) <input checked="" type="checkbox"/> Live Interaction <input checked="" type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/05/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/06/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/07/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction <input type="checkbox"/> Academic Progress	10/08/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day
French, Jessica	10/02/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day	10/03/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction	10/04/2022 LP 4 (09/26/2022 - 10/28/2022) <input checked="" type="checkbox"/> Live Interaction <input checked="" type="checkbox"/> Synchronous Instruction	10/05/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction	10/06/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction	10/07/2022 LP 4 (09/26/2022 - 10/28/2022) <input type="checkbox"/> Live Interaction <input type="checkbox"/> Synchronous Instruction	10/08/2022 LP 4 (09/26/2022 - 10/28/2022) Not a school day


### How to Take Attendance in SIS

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

Prior to claiming attendance, a ToR should have met each student, reviewed the student's body of work, and collected samples for the respective learning period.

First, make sure that all Attendance Grid Logs (not applicable to VP ToRs) are sent out on the last day of the learning period. Make sure that the days in which a learning activity took place are checked. They cannot be sent before the last day of the learning period. Parents will sign electronically. You will be automatically notified via email that the parent has signed the grid log. Follow the link to the grid log to sign or find the log in your 'Sign Document Compliance' section of SIS. . You will sign AFTER the parent does.

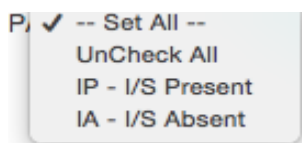
Second, once all of your attendance grid logs are returned, take attendance for your whole roster. Your signature should fall on a work day, not a weekend or holiday. (A parent signature on a weekend or holiday is fine.)

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

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1	<input checked="" type="checkbox"/>					
LP: 2	<input checked="" type="checkbox"/>					
LP: 3	<input checked="" type="checkbox"/>					
LP: 4	<input checked="" type="checkbox"/>					
LP: 5	<input checked="" type="checkbox"/>					

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

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



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

You will then print and archive your attendance. These are [helpful slides](#) and a helpful [video](#) on this procedure .

### How to Complete AWRs

AWR= “Assignment and Work Record”

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

AWRS must be completed before the beginning of each LP. This pre-loading of objectives and assignments creates a pacing guide for the class, and can be printed/shared with families in the Personalized Path in order to help hold the home educator accountable for progress. After



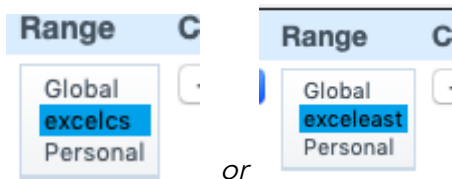
each learning period, the AWRs should be reviewed and/or adjusted to reflect the actual work completed for that subject.

#### *AWRs Fundamentals:*

- *Choose objectives/standards that were attempted and the assignments that correlate* Each module must have objectives and assignments
- *Reflect the number of days in the LP*
- *Utilize most up-to-date curriculum in SIS*
- *Add any applicable curricular that is part of the core curriculum*

*Please use the curriculum/textbook your student is using, if at all possible:*

1. *Curriculum content must be added to a course before AWRs can be loaded. Curriculum content is the scope and sequence of the course in the form of lists of objectives/standards and assignments associated with textbooks, classes or the state standards.*
2. *When choosing a curriculum content for your AWRs, make sure you are selecting the curriculum from the proper range (excelcs or exceleast).*



3. *Make sure you are looking at the correct edition. Usually, you can still use a different edition, but check off the assignments in a different order, as the books are usually very similar.*
4. *If you are using a curriculum already in the system, make sure it has both Objectives and Assignments listed.*
5. *For any new curricular requests, there will be a review process, a submission window and deadlines. Please contact your education coordinator for the appropriate deadline.*

*If your textbook is not in the system, please choose standards for the TK-8th student, and high school students should be choosing the corresponding CP curriculum content:*

1. *Choose the current grade level standards for Math or Language Arts.*
2. *Science and Social Studies may be outside of the grade level for TK-8, but you must use the multi-grade level standards found in "excelcs" and "exceleast." (Make sure that 6-8th grade students hit all of the science for those grade levels before high school, if they decide to go out of the order listed in the standards.) You can use the search function with the keyword 'Excel' to find these.*
3. *Standards that are in SIS mainly read as objectives. Each module must have both objectives and assignments. If you must use curriculum content that do not have*

assignments listed, you must add assignments as custom comments. (For example: Student will complete worksheets. Student will read textbooks. Student will complete assessments on the above objectives/standards.)

Step -by-step instructions are below. You can also watch this video on how to complete AWRs: [Adding AWRs from Assigned Curriculum](#)

### **AWRs Step-by-Step**

Before the new LP:

1. From your roster page, choose toggle the arrow next to a student's name to see all of their classes.
2. Choose the curriculum that you want to populate and the LP# next to that curriculum. This will open your "add/edit assignments" window.
3. Type in the 'assigned on' date. It will be the first day of the learning period.
4. Click on the module that you want to open.
5. Choose any additional objectives that will be attempted and methods/assignments that will be used to complete these objectives/assignments.
6. There must be assignments if you choose an objective.
7. Scroll down to the bottom and click 'assign'
8. This will open the records page. In the top left corner, choose save. If you're done, close the tab.
9. If you need to add more, you can choose the + sign.
10. Sometimes you have to choose the module.
  - a. It will open to add/edit window
  - b. Choose assign from curriculum
  - c. Choose the additional assignments/objectives that need to be added.
  - d. Add the assigned on date
  - e. Choose assign
11. Repeat this process for each relevant curricula in each class.
12. You might not use each curriculum every time
  - a. You might need to use a combination of textbooks and standards
  - b. You might have a student working from multiple books

**\*\*Virtual Path Teachers will input AWR content for one student and it automatically copies it to the remainder of the students enrolled in the class.**

After each LP

1. Review the AWRs for accuracy against the completed learning for the subject. You may need to add or delete some objectives/standards and/or assignments to create an accurate record.
2. During your review, find the objective and assignment that matches your uploaded sample for the LP. It is helpful to think of the sample as a picture and the objective & assignment as its caption. The auditor and CoCowill look for this to match.

3. *This video will help you add/edit objectives and standards*

*Helpful videos:*

[\*Adding forgotten dates or adding objectives and assignments\*](#)

[\*Adding to an AWR\*](#)

*How to complete a custom comment in SIS:*

*This should not be a common practice used to create AWRs. Custom comments should only be used to refine the AWRs when clarity might be needed for the auditor. They should be written so that they connect and flow within the curriculum that is being used. They should not 'stick-out' in an obvious way.*

1. *Watch the following videos on how to write custom comments or add a comment(s) to standards.*
  - a. [\*Adding Assignments \(Custom Comments\) to Standards\*](#)
2. *Custom comments should have:*
  - a. *Objective/WHAT was learned: "Student will identify parts of a butterfly," "Student will observe butterflies in their natural habitat," "Student will learn about the jobs of an Ichthyologist," "Student will identify the plants eaten by Monarch Butterflies." "Student will observe butterfly collections from around the world." etc.*
  - b. *Assignments/HOW it was learned: "Student will read a book." "Student will watch a video." "Student will study charts identifying butterfly parts." "Student will complete a worksheet." "Student will attend a field trip to the butterfly museum." "Student will complete an art project."*

*Students who did not complete any assignments for the LP should have it noted in the AWR for that subject.*

*Your AWRs will represent the learning the student SHOULD have been completed for the LP. But, you will write a comment (see below for instructions) for each subject area affected that reads: "Student failed to complete assigned work in this subject." OR "Student completed \_\_\_% of the assigned work for this subject."*

*Follow the instructions below:*

1. *Click on the little square at the bottom of the assigned AWRs.*


2. A box will open and you will type the comment in the box. This will be repeated for any other subjects, as necessary.

### Loading Samples Into SIS

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

1. Go to Teachers > Compliance > Archive Compliance
2. Make sure the following information is chosen:
  - a. Report title: Work samples
  - b. Include students "with or without Archived reports"
  - c. Staff: your name
  - d. Range: the correct LP
3. Choose "Generate Report" button
4. Watch this video on [how to load samples](#):
5. You may load TK-8 samples in each section or load them as a single document into "Language Arts" or, for the Virtual Path, into the CMS classroom title. They must be in the following order: ELA, math science, social studies and PE
6. High school samples must be loaded into their individual classes.

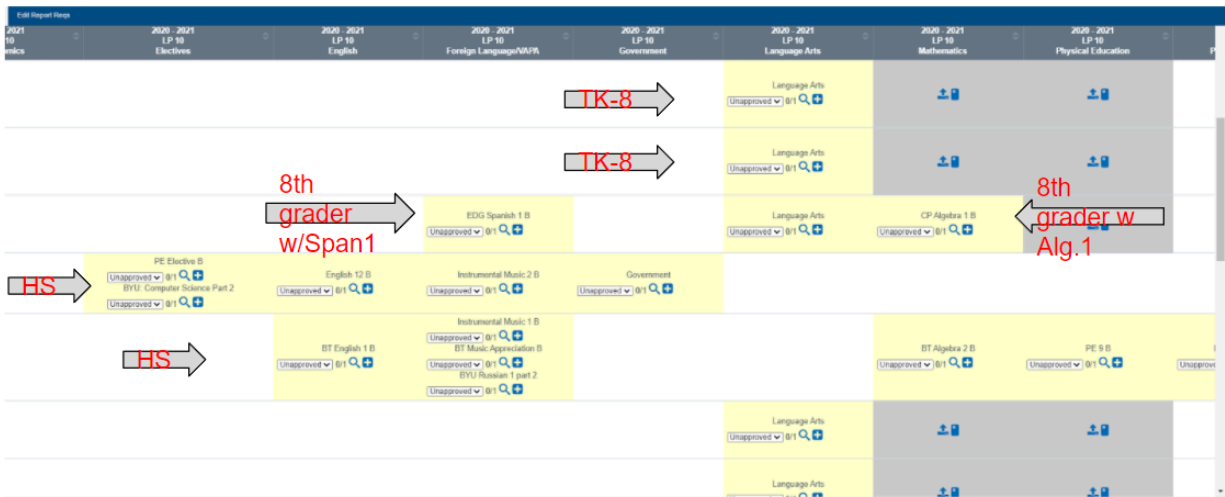
7. Samples must be jpeg or .pdf files.
8. Uploading options:

- a. Option #1: Upload from a computer or Google drive using the 
- b. Option #2: Direct upload from your phone via text message: This works for

single pages only. 

**Sample Archive Compliance:**

Below is a sample screenshot from Archive Compliance after samples have been uploaded. Please note that high school classes, including those for junior high school students, are loading into the individual classes. This helps HQT's to check for their specific subject.



The screenshot displays a grid of class categories and individual class entries. The categories are: Electives, English, Foreign Language/NATL, Government, Language Arts, Mathematics, and Physical Education. Individual class entries include: PE Elective B, BT Computer Science Part 2, English 12 B, Instrumental Music 2 B, Government, EDG Spanish 1 B, Language Arts, CP Algebra 1 B, PE Elective B, BT English 1 B, Instrumental Music 1 B, BT Music Appreciation B, BYU Russian 1 part 2, BT Algebra 2 B, and PE 9 B. Annotations include: 'TK-8' with arrows pointing to Language Arts entries; '8th grader w/ Span 1' with an arrow pointing to EDG Spanish 1 B; '8th grader w Alg. 1' with an arrow pointing to CP Algebra 1 B; and 'HS' with arrows pointing to PE Elective B, BT Computer Science Part 2, and BT English 1 B.

**Archiving AWRs**

After you have completed all of your AWR's for every student on your roster, you will archive the AWR's all at the same time. **This must be done AFTER you take attendance for your roster.**

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

Semester 1 (Fall) of (2014 - 2015) C						
	Att.	AL.	LL	AWR	WS	PBL
LP: 1	<input checked="" type="checkbox"/>					
LP: 2	<input checked="" type="checkbox"/>					
LP: 3	<input checked="" type="checkbox"/>					
LP: 4	<input checked="" type="checkbox"/>					
LP: 5	<input checked="" type="checkbox"/>					

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

The screenshot shows the 'Sign and Archive electronically' interface in the School Pathways system. The 'Signature Line' section has 'Teacher' selected. The 'Attendance Line' section has 'Acknowledgment of learning period days' selected. The 'Assignments' section has several checkboxes for display options. Below the sections are 'Back', 'Preview', and 'Print' buttons. At the bottom, there is a 'Select' table with student names: Cardona, Brayden; Salaiz, Faith; Salaiz, Grace; and All. A 'Sign & Archive Electronically' button is also visible.

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

Attendance Forms	
Form #2a0 - LP 1, Track B	
Verified	Archived
21 Student(s)	
<a href="#">[View]</a>	<a href="#">[Edit]</a>

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

## Completion of Compliance

*Grading for Students  
w/ Little to No Assignments*

*Q: Should the AWR show all objectives and assignments for each Learning Period?*

*A: Yes. All objectives and assignments noted on the pacing guide should be noted on the AWR. Remember that AWRs are assigned before the LP begins, showing what the student is planning to complete. The purpose is to establish the intended learning and workload for each student per LP. Ex: Student will complete lesson 6.*

*Q: What if a student only completes a few of the total assignments?*

*A: Place a custom note (see below).*

*Q: Can the uploaded sample reflect a student's best work even if they are failing a course? (ex. Uploaded sample earned an "A" but the student earned an "F" in the course.)*

*A: Yes, but ideally the sample should reflect the grade they have in the course. The lack of work completion as noted in the custom comments or low grades on their other assignments will also support the lower grade in the course. If the lower grade occurred because the student failed to turn in assignments, the comment on the AWR should show less work was completed, indicating the purpose of lowering the grade.*

*Ex: "Student completed 2 out of 10 assignments." ~which would be an "F"*



*Q: Should I note a lack of work completion on the report card?*

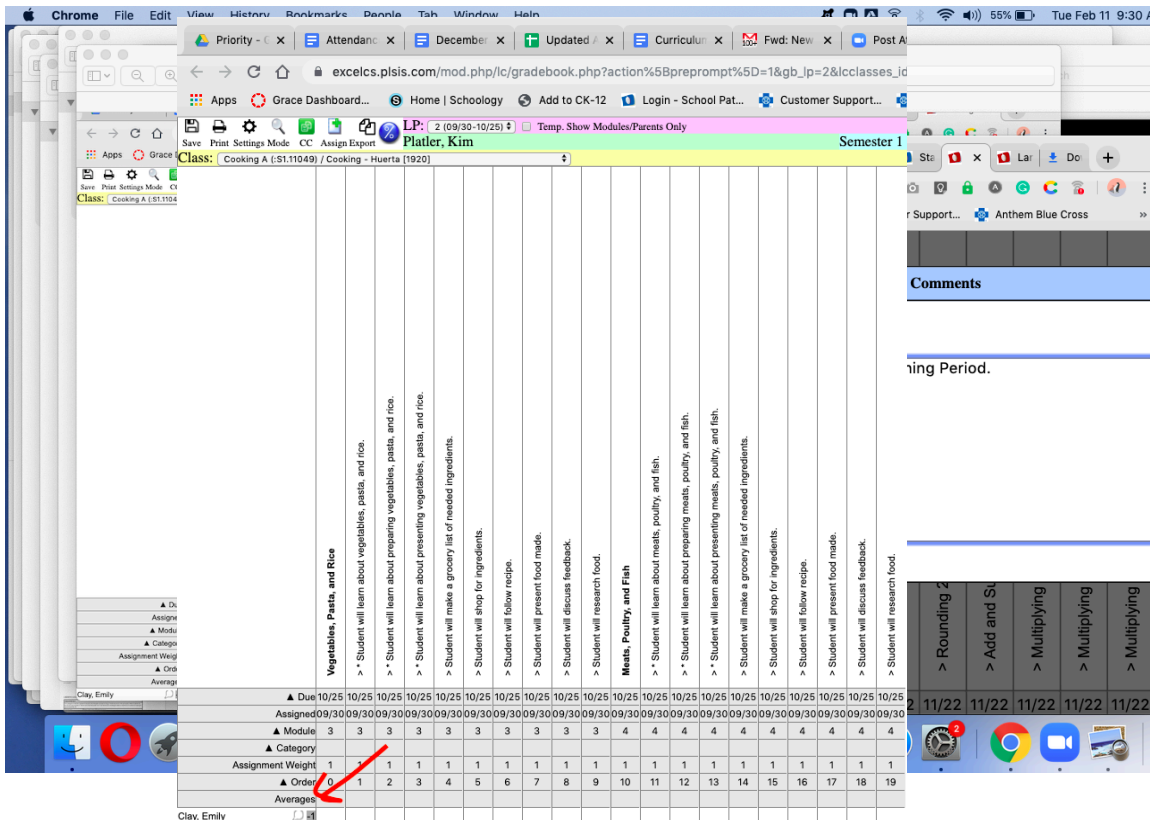
*A: The report card should include a line about why the grade was lowered. Ex: Student only completed 20% of work, resulting in a lower grade and/or failing of the course.*

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

1. Choose assignments for your AWRs that represent the 20 days of learning the student SHOULD have completed for the LP.
2. Then, you will write a comment (see below for instructions) for each subject area affected that reads: "Student did not complete assigned work in this subject."

*How to Include a Comment on AWRs:*

1. While in the AWR for the class with no samples, click on the little speech bubble at the bottom of the assigned AWRs next to their name.
2. A box will open and you will type the comment in the box for each subject that you received little to no work. If you receive work in one subject, you will keep that AWR as normal.





# ToR Roster Requests:

ToR will send [admissions@excelacademy.education](mailto:admissions@excelacademy.education) requests for the following:

1. Names of anticipated students you would like on your roster-this is a request, not a guarantee. (Follow Request Format previously sent out-ToR not to tell families they have room on roster)
2. Incoming siblings-Name and Grade level
3. Desired roster count (Admin approval required)

## Custody Notes in SIS

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

If a student's parents are divorced, ask them about any custody arrangements they might have. If the parents have joint legal custody, we will need to have both the father and mother sign the Master Agreement in SIS before archiving. If you need to add a signature after, you can always do an addendum.

Go to the dashboard of the student.

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



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

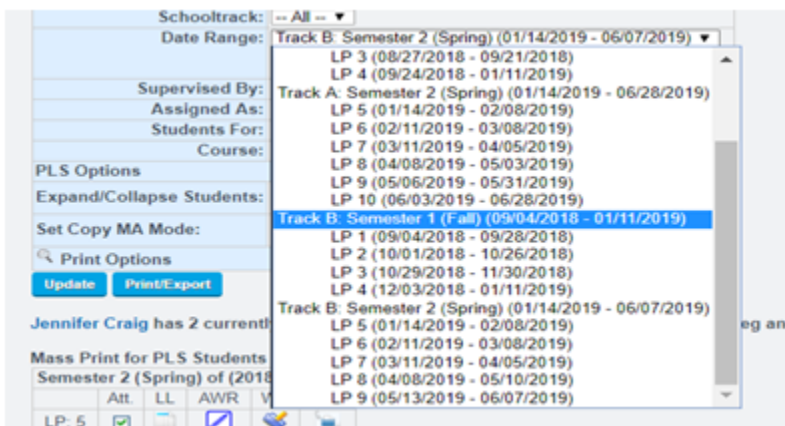


## Report Cards in SIS

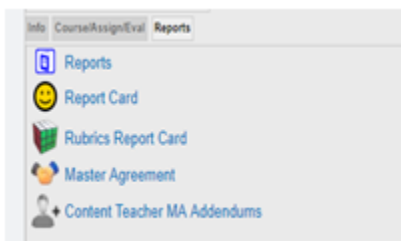
**\*\*\*Please refer to the shared report card folder for pertinent information and specific details.**

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

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



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



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

Class Information	Semester 1 (Fall)			Hide			Hide All Terms
	Computed Grade	Override Computed	Comments	Class	Teacher	Print	
Language Arts (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>					
Mathematics (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>					
Science (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>					
Social Studies (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>					
Physical Education (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	<input type="text"/>					

6. The above screenshot represents a TK-8 report card. \*\*\*You will NOT type in anything under the column titled Computed Grade. You will type in the grades under the column titled Override Computed.

7. TK-5 - Using the 4-1 scale, under the column Override Computed you will indicate the appropriate number (4, 3, 2, or 1) next to the designated subject.

8. Here is an example of the completed column with the appropriate grades.

Class Information	Semester 1 (Fall)			Hide			Hide All Terms
	Computed Grade	Override Computed	Comments	Class	Teacher	Print	
Language Arts (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	3					
Mathematics (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	3					
Science (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	2					
Social Studies (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	3					
Physical Education (1000-17EA.01.12750) PLS Teacher: Craig Jennifer	-	1					

9. Grades 6-8 - Using the A-F scale, under the same column as above (Override Computed) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 6-8 will earn letter grades (not numbers).

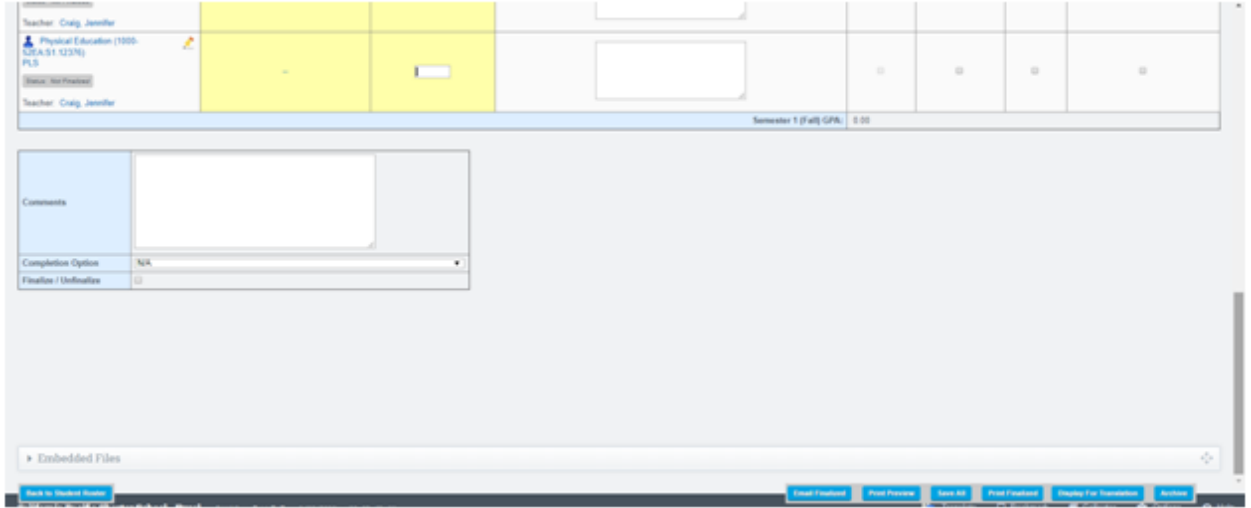
10. Grades 9-12 - Using the A-F scale, under the same column as above (Override Computed) you will indicate the student's appropriate letter grade for each designated subject. The only difference is that students in grades 9-12 will also earn credits (5 per semester) which will be indicated in the Credits column. \*\*\*You will only type in the shaded yellow columns. Once you type the credits in the shaded yellow column, the

credits will also appear in the white column titled Credits Attempted/Credits. Example:

Class Information	Credits Attempted		Computed Grade	Semester 1 (Fall)		Comments	Hide
	Credits	Override		Override	Credits		
Dance 2 A (2355-3EA:S1.12301) PLS Status: <span style="color: green;">Prerequisites</span> Teacher: Mashburn, Mandy	5	<input type="checkbox"/>	--	<input type="checkbox"/> <span style="color: blue;">Completed</span>	5	<input type="text"/>	<input type="checkbox"/>
EDG: Chemistry w/Lab A (2607-14EA:S1.12301) PLS Status: <span style="color: green;">Prerequisites</span> Teacher: Mashburn, Mandy	5	<input type="checkbox"/>	--	<input type="checkbox"/> <span style="color: blue;">Completed</span>	5	<input type="text"/>	<input type="checkbox"/>
EDG: Mathematics III A (2427-1EA:S1.12301) PLS Status: <span style="color: green;">Prerequisites</span> Teacher: Mashburn, Mandy	5	<input type="checkbox"/>	--	<input type="checkbox"/> <span style="color: blue;">Completed</span>	5	<input type="text"/>	<input type="checkbox"/>

11. **Comments - Please refer to the report card folder.** Every student in grades TK - 12 should have at minimum one comment on the report card that has been chosen from the dropdown. Some students may have more than one depending on their progress in each subject. In the column titled Comments, you do not have to type any comments in line with the designated subject for your students in grades TK-12, unless the student is performing below grade level as specified on the directions and FAQ documents in the shared Report Card Resource Folder. There is a specific example for 6-8 grade students. Please refer to the shared folder.
12. If you had a student drop prior to the withdrawal deadline, simply hide the course; do not do an addendum. If your student withdrew after the deadline, remember to include the "W" or the "F" based on the withdrawal date.
13. ToRs will input "IP" for the grade of all concurrently enrolled courses and zero out the credit earned. Upon the receipt of the official transcript, the registrar will input the grade and credit earned and then email ToRs when complete. At this point ToRs can update the report card to reflect the college class grade if requested by the parent. However, once the registrar department inputs the grade and credit for college courses, then the parent can automatically see that reflected in their parent portal on the transcript view, thus updating the RC is not a necessity.

14. At the bottom of the report card, you will see another box titled Comments. For TK-5 students, please cut and paste the appropriate 4-1 grading scale.



15. **\*\*\*IMPORTANT - DO NOT INDICATE SPED OR EL ANYWHERE ON THE REPORT CARD. Prior to creating a report card, please confirm with the Case Managers the grades of students with IEPs.**

16. If you have questions about comments, please email Jenny Craig.

17. Please make sure to click Save All if you are not ready to finalize the report card, so you can come back to it at a later time.

18. Click the box next to Finalize under the Comments box when you have completed the report card. The screen will become shaded.

19. Then, click Save All.

20. Click Archive to sign and date (always the last day of the semesters.) Once archived, you will be directed to a new screen and you will see a blue arrow to click to view, which will create a PDF to save and print to send to your student/parent via email.

21. Make a copy of each report card to bring to the office to be filed in student cumulative folders.

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

Year: 2018 - 2019		Grade: 11			
Subject	Credits Attempted	Semester 1 (Fall)			Comments
		Mark	Credits		
Dance 2 A	5	A	5		
EDG: Chemistry w/Lab A	5	A-	5		
EDG: Mathematics III A	5	B	5		
ODY: English 11 A	5	A	5		
ODY: US History A	5	B	5		

Semester 1 (Fall) GPA: 3.60

This student has [completed/not completed] \_\_\_\_\_ all course work for grade \_\_\_\_\_ and [has/has not] been promoted to grade \_\_\_\_\_.

Teacher Signature: \_\_\_\_\_ Date: \_\_\_\_\_

\*\*\*FALL - Do not complete the sentence regarding promotion



*\*\*\*SPRING - Complete the sentence indicating promotion to the next grade level. For example  
- This student has completed all course work for grade \_\_\_\_ and has been promoted to grade \_\_\_\_.*

*Please indicate the promotion status on the RCs for HS students as...*

*Student in 12th grade who graduated...*

*has promoted to completion of required credits towards a high school diploma*

*Student who will be completing a fifth year in HS...*

*has been promoted to a fifth year*

*Student who will earn a certificate of completion...*

*has been promoted to certificate of completion*

#### *TK-5 Scale for Comments Box*

*4: Exemplary – Above Grade Level*

*3: Proficient – At Grade Level*

*2: Approaching Proficiency*

*1: Non-proficient*

#### *Helpful Hints -*

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

*\*\*\*If you choose to print at another time, you can go into your archive through SIS to print the report cards. \*\*\*ToRs will be provided with a shared folder to drop in report cards and progress reports for Admissions to put in student cumes. \*\*\*Progress reports are printed and not completed through SIS. Progress Reports are found in the shared Report Card Folder. MAKE A COPY FIRST AND KEEP THE BLANK ORIGINAL IN THE FOLDER FOR OTHERS TO USE.*



## *Documentation within Contact Manager and Student Notes*

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

### *Contact Manager*

*Documenting contact with your families and important student information is easy in the SIS. The first area this is possible is through Contact Manager, which will be used for the following:*

- ❖ Documenting a phone call, rescheduled LP Meetings with reason or concerns*
- ❖ Documenting a phone call that pertains to an issue that might lead to a BIP or PIN*
- ❖ Conversations with parents about complaints, or them refusing to comply with school expectations (samples, assessments, WIN, curriculum, etc)*
- ❖ Document meetings that are held and include the date: SST, AIM, 504 Plan, Best Interest (PIN3), IEP, Manifestation, etc.*

### *\*\*Examples:*

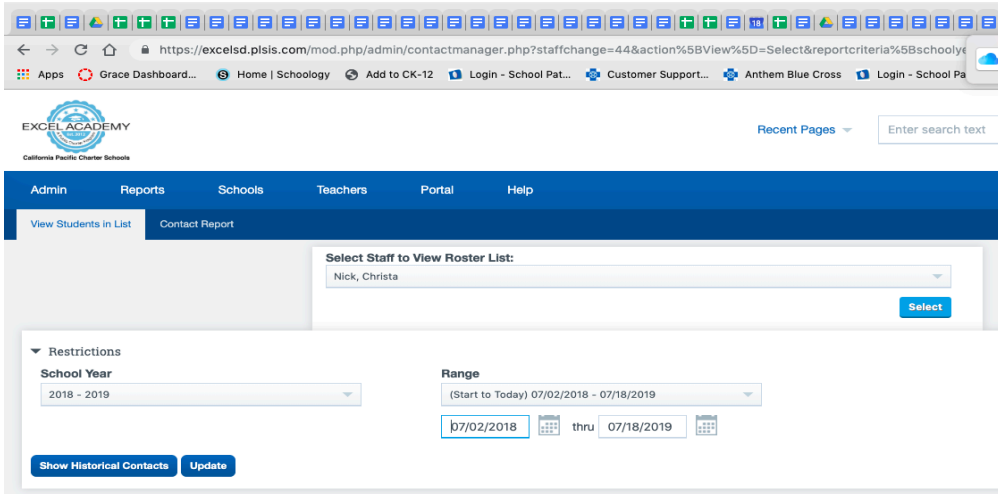
- ❖ You met with a family more frequently than the usual LP meetings*
- ❖ A first meeting with a parent who is new to Excel Academy Charter School reviewing the Master Agreement and Acknowledgment of Responsibilities.*
- ❖ Injury or Incident at a School Event/Field Trip (contact should be made with BOTH the parent and admin and you would document that you talked with both.)*
- ❖ A conversation with a parent discussing a PIN or any conversations about opting-out of assessments.*
- ❖ Dates SSTs took place.*

### *To Access Contact Manager:*

- ❖ Go To "Teachers" Tab and scroll down to "Content Manager" and Select "Contact Manager" again in the menu.*

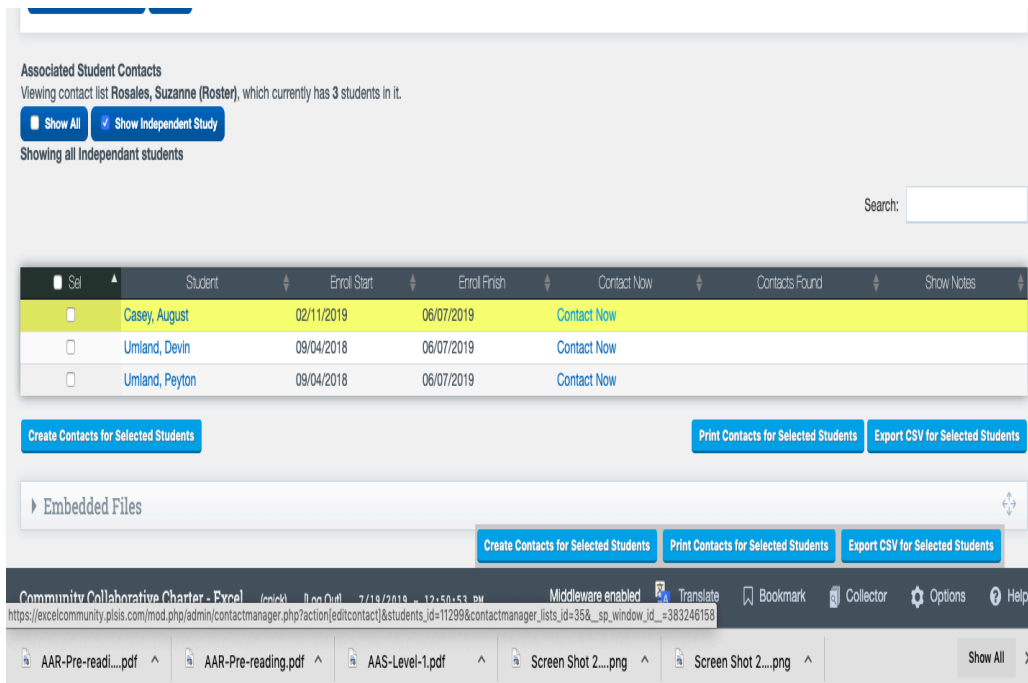
➤ You can also get to Contact Manager from the Home Screen and when on the student dashboard. Just look for the words "contact manager" and it will take you to the same place.

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



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

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



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

<b>Area/Subject of Focus:</b>	-- Choose --
<b>Date Contacted:</b>	07/19/2019
<b>Beginning Time:</b>	12:51 <input type="radio"/> AM <input checked="" type="radio"/> PM
<b>End Time:</b>	1:36 <input type="radio"/> AM <input checked="" type="radio"/> PM <small>Note: If left blank when creating a new contact, the finish time is automatically set when saving the contact.</small>
<b>Total Time:</b>	45 <small>Total time in minutes.</small>
<b>Contact Method?</b>	In-Person
<b>Successfully Made Contact?</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Follow up Required?</b>	<input checked="" type="checkbox"/> Yes
<b>Notes:</b>	<p>Met for LP 4:</p> <p>Only received 3 samples and parent did not show a body of work. I reemphasized my need to see a body of work and that they should come prepared to the meeting with the learning for the LP.</p> <p>Parent stated they will follow up with me next week to show learning took place.</p>
<b>Send Notification Flag:</b>	-- SELECT --

**Save Contact**

- ❖ *Click "Save Contact"*

## Student Notes Section:

*The second area you will log information will be in the "Student Notes" section of the SIS. This section will be used for things that need to be recorded, but are not necessarily interactions with the student or parent. Some of the following reasons would qualify:*

- *Instances of Plagiarism (upload the plagiarized copy to the notes section; change to pdf if you have difficulty uploading)*
- *Behavioral Issues*
- *CHYA opt-out letters from parents*

*If you go to the student dashboard (you can get to Student Notes by clicking on the student name anywhere in the SIS, including your roster page); then, scroll down to the Student Notes section of the dashboard.*



## GoGuardian

*GoGuardian is used by the school to monitor students using school-issued technology. Teachers in the Virtual Path, as well as those teaching other synchronous classes, use GoGuardian Teacher to monitor the live classes in real time.*

*All teachers in the Virtual Path are required to use and monitor GoGuardian Teacher during class time. In order for GoGuardian Teacher to work properly, students must be logged into their school-issued technology using the gmail account provided by the school. If students are logged into the Chrome browser using another google account, GoGuardian Teacher will not work and their screens will not be visible.*

*Each year, Student Services will create new classrooms in the system and add students to the classrooms based on enrollment. Teachers should not manually add students to the classroom, unless asked to do so, in order to avoid errors with students connecting to the application properly.*

*Once set-up, GoGuardian Teacher enables teachers to monitor students, force student applications open, chat with students in real time, record teaching sessions, and much more!*

*For help using GoGuardian Teacher, please refer to the [GoGuardian Teacher Help](#) website.*

[GoGuardian Teacher](#)-Link to Application Login



## First Steps with Assigned Families

*Assigned Students:* You will be assigned students both before school starts and throughout the school year. Before school starts, your roster will be in the Student Information System (SIS), for which you all should have logins. Parent logins can be found in SIS and are able to be sent by the ToR if a parent forgets their login. If the family does not have a login, please reach out to Keri Schneeweiss @ [kschneeweiss@excelacademy.education](mailto:kschneeweiss@excelacademy.education).

*For students assigned after the school year begins, the admissions office will send you an email letting you know a student has been placed on your roster. Once you receive this email, please look carefully in the SIS for any pertinent information about the student, including the receipt of transcripts for secondary students. (See the SIS section for instructions on how to access student information.) Once the student is highlighted in [blue](#), you may contact the parent. See the section on [Enrollment status and Additional Information](#) for an explanation of the different colors in SIS.*

*For Secondary students new to Excel, please follow the process outlined in the [New Secondary Student Checklist](#). These students will need to meet with their counselor before the MA can be written.*

*Transfer Students:* At times it is necessary to transfer a student from one ToR to a new ToR. The process is similar to that of an assigned student, except, once the school year begins, you will complete an addendum to the original Master Agreement (MA), rather than a completely new Master Agreement. For instructions on this process, please see the [addendum video](#) located in the "Training Materials and Manuals" folder of the Education folder.

*The [Pathway Transfer Instructions](#) doc outlines the process and steps necessary to transfer a student between pathways once the school year has begun. Prior to the school year beginning, reach out to Admissions to make a pathway change.*

*Your Role as ToR:* The ToR/family relationship is very important to most families. They are looking for someone who can be there to guide them, provide encouragement and work alongside them to ensure a successful academic year for their child(ren).

*Please note: ToRs should never contact a student via email, phone, text, social media or any other messaging system without the parent/guardian also being included in the correspondence. Even then, prior permissions from the parent/guardian should be granted before including students in a conversation with you and the parent. At no time should conversations between a ToR and student occur without the parent/guardian.*

- *Initial Email: Send a welcome email to all new students before reaching out via telephone or Zoom. Even if it is the same day, it's less intimidating for the parent and more likely that they will answer the first time. In the introduction email, attach applicable documents of help. (ie. Menus, [TK-8 Curriculum Handbook](#), school calendar, etc.)*
  - *If the parent replies, this is a great opportunity to set-up a Zoom meeting to discuss the curriculum or classroom expectations. Let them know that the Zoom will be approximately 45 minutes.*
- *Initial Phone Call: This call is a brief time to confirm student details and ensure the family knows how our school functions. You can use [this checklist](#) to guide your phone call.*
  - ➔ *Ask the parent questions about their family and how they came to Excel Academy. Ask them what their goal is for independent study (escape bullying in school, desire character building, improve academics, etc.). This will give you a feel for what is important to the family and how you can best approach them as a teacher.*
  - ➔ *Introduce yourself and your role as their Teacher of Record. Feel free to let them know a little about your family or hobbies, as well as your passions within education.*
  - ➔ *Confirm Name, Grade Level, Birthdate, Telephone Number, Address and Email of each student in the family. Each year we have students with incorrect information or the wrong grade level in the SIS! Also, use this time to ask for alternative contact information (like additional phone # or email.) \*Let the family know that we communicate primarily via email and that they should check it daily for important information from you. Let them know you will always email them back within 24 hours (1 business day) and they must respond to emails within 48 hours (2 business days.)*
  - ➔ *Ask the parent about any custody arrangements. Say: "We want to make sure to respect any family arrangements that you may have, so if there are any custody arrangements or special concerns you wish for us to honor, please let me know. If your child(ren) splits their time between homes, that is completely*



*fine, just let me know so I can include both parents' signatures on the Master Agreement and Acknowledgement of Responsibilities." \*Refer to instructions in the SIS section of the manual for reporting legal custody arrangements to the Registrar's office: [registrar@excelacademy.education](mailto:registrar@excelacademy.education).*

- *Please be sure to notify new families that the CCP classes must be ordered at least 10 business days before the student's first day of classes (ToRs must submit for processing 7 days prior to the first day of class)*
  
- *(Virtual Path) Set up a Zoom meeting to go over the expectations of the classroom & School procedures. (Refer to: [Back to School Parent Meeting Checklist](#))*
  
- *(Personalized Path) Describe the role of the parent as the primary teacher for the student*
  - ◆ *The day-to-day teaching and correction of learning assignments is completed by the parent/guardian. You will support them as the credentialed teacher, but you do not tutor the student in any way,*
  - ◆ *Parents/guardians must oversee student learning on a day to day basis, be responsible for all work completion and ensure all necessary student work learning is brought to the Learning Period (LP) meeting.*
  - ◆ *Instructional funds (IFs) can be used to purchase curriculum or classes, with the ToR having ultimate say over where funds are allocated if a child needs resources allocated differently to support their comprehensive Course of Study. Core curriculum must be in place before supplemental classes and curriculum are purchased. Religious material or classes are not acceptable and are not allowed for purchase or use at Excel Academy.*
  - ◆ *There will be daily teacher-student instruction offered and the parent must log their attendance daily.*
  - ◆ *Parents will provide samples monthly at a meeting with the ToR.*
  
- *For Personalized Path families- et up an in-person meeting or Zoom to discuss curriculum, courses, and sign paperwork. This will need to be within a few days. Please note: All Content and Community Provider classes must be ordered 10 business days before the student's first day of classes.*
  - *Let them know to bring any curriculum they already have on hand so that you can approve it and take a picture of the Table of Contents for each book for reference throughout the year.*

- Have them think about their curriculum choices before they meet with you. Share the TK-8 Curriculum Menu and Handbook and High School Course Catalog with the parent ahead of time.
- Let them know that the meeting will last about one hour.
  
- End the phone call by asking if they have any questions.
  
- Send a follow-up email. Thank the parent for their time and send all of the resources, including free subscriptions, resources, etc. that were discussed on the phone.

## *Prospective Student Contact:*

ToR will contact parents via email and phone to welcome the family to Excel Academy and to ask them for withdrawal date verification from their previous school. (Students in **RED** need withdrawal verification)

1. Phone and send follow up email to pending student(s) on your SIS roster.

The following are example emails for families assigned to your roster. Please use the appropriate emails based on the color students show up on the roster. Students in RED still need a withdrawal confirmation.

---

### Student(s) Show **RED** in SIS

Hello \_\_\_\_\_ Family!

My name is \_\_\_\_\_, and I will be your Teacher of Record for this year. Could you please give me a quick reply to this email so I know that you received it? I will call <insert approximate time or date> to introduce myself. This will be a brief phone call to set up our intake meeting.

*We are missing an important piece of information. Please provide an email verification from you or your previous school stating the last date your child(ren) were enrolled with that school. You can send this to me directly via email and I will make sure the admissions department receives the information. We cannot complete enrollment until we have this information.*

*For junior high families include - If you have not already done so, please be sure to send your child's academic records including their report cards to our Registrar - registrar@excelacademy.education.*

*For High School families include - If you have not already done so, please be sure to send your child's academic records including an unofficial transcript and report cards to our Registrar - registrar@excelacademy.education.*

*I am excited to work with you and your child(ren). My job is to help you with all aspects of independent study. As your child's Teacher of Record, I will monitor their progress and collect their work samples throughout the year. To support you, I will help plan your curriculum, answer your education questions, and manage your instructional funding.*

*For TK-8th - During that first meeting, we will complete your enrollment by signing a Master Agreement/Acknowledgement of Responsibility and additional paperwork. We will also discuss curriculum choices, our program's structure and guidelines to begin planning for the school year. In the meantime, please feel free to browse through some of these resources:*

*\*[Excel Academy Website](#): I encourage you to read the school handbook and watch the video about your pathway.*

*\*[Excel Academy CCP list](#): this is a list of our current providers that accept education funds from our school*

*For 9th-12th - See above*

### **Documents Attached:**

- *School calendar*
- *Preparing for the school year: This is basic information to know before completing your enrollment.*
- *Curriculum Menus/Handbook*
- *Course of Study: Please use this to record your final curriculum choices.*
- *Parent Meeting LP checklist- This is basic information to help you understand our expectations for our learning period (LP) meeting, which are monthly.*

*My phone number is <insert phone number>. I look forward to speaking with you soon!*

## Student(s) Show BLUE in SIS

Hello \_\_\_\_\_ Family!

My name is \_\_\_\_\_, and I will be your Teacher of Record for this year. Could you please give me a quick reply to this email so I know that you received it? I will call <insert approximate time or date> to introduce myself. This will be a brief phone call to set up our intake meeting.

I am excited to work with you and your child(ren). My job is to help you with all aspects of independent study. As your child's teacher of record, I will monitor their progress and collect their work samples throughout the year. To support you, I will help plan your curriculum, answer your education questions and manage your instructional funding.

*For High School families include - During our call, I will schedule your appointment to meet with our School Counselor to schedule your classes. They will also send your Master Agreement/Acknowledgement of Responsibilities for you and your student to sign. If there are still outstanding academic documents, be sure to send your child's academic records including an unofficial transcript and report cards to our Registrar - [registrar@excelacademy.education](mailto:registrar@excelacademy.education).*

**Note to ToRs: Secondary teachers send MA to new families after LP 1.**

*For TK-8th - During that first meeting, we will complete your enrollment by signing a Master Agreement/Acknowledgement of Responsibility and additional paperwork. We will also discuss curriculum choices, our program's structure and guidelines to begin planning for the school year. In the meantime, please feel free to browse through some of these resources:*

*\*[Excel Academy Website](#): I encourage you to read the school handbook and watch the video about your pathway.*

*\*[Excel Academy CCP list](#): this is a list of our current providers that accept education funds from our school*

### Documents Attached:

- o School calendar
- o Preparing for the School year: This is basic information to know before completing your enrollment.
- o Curriculum Menus/Handbook/HS catalog
- o Course of study: Please use this to record your final curriculum choices.
- o Parent Meeting LP checklist- This is basic information to help you understand our expectations for our learning period (LP) meeting, which are monthly.

My phone number is <insert phone number>. I look forward to speaking with you soon!

1. ToR will attempt to make contact for 5 school days through phone calls and emails.
2. If there is no response from the parent after 5 school days-the ToR will send the following email with the appropriate student/family information.

---

## **No Parent Response After 5 Days**

Hello Mr. and Mrs. \_\_\_\_\_

My name is \_\_\_\_\_ and I am a Teacher of Record with Excel Academy and have been assigned as your ToR.

I have attempted to contact you via phone and email several times during the last few days but have been unsuccessful in reaching you. I am eager to partner with you on your educational journey. However, if I do not hear from you within the next 2 calendar days, I will assume you are no longer interested in our school, and you will be placed on a waitlist with the Admissions Department.

Thank you,

(Excel Academy Signature)

1. Notify Admissions(admissions@excelacademy.education) and the Registrar (registrar@excelacademy.education) to let them know the newly assigned family has made no contact with you or is not interested in enrollment with Excel at this time.
2. Admissions will attempt to contact the family and/or place the student(s) back on student intake with a designation of previously placed (PP).

## **Personalized Pathway: Initial Meeting**

The initial in-person or Zoom meeting is a time to go over the responsibilities of the parent/guardian and/or any changes in policies for the current school year for returning parents. You will introduce parents/guardians to the ordering system (OPS), Beehively, and the many resources available to them (TK-8 Curriculum Handbook, free school-wide subscriptions, etc.) If the parent/guardian understands and agrees with the policies set forth in the Master Agreement (MA) and AoR, they will sign them at this time for TK-8th. High school students will

sign their MA following their initial meeting with the School Counselor. Secondary ToRs should have reviewed this in their initial phone call and then be available for any follow-up questions.

This meeting may be in-person or virtual. With a shortened ordering time in August, Zoom and Google Meets are the virtual meeting platform options for reviewing important documents with families while still 'seeing' each other for the first time. New families may want to meet in person before committing to our school. Please work with each family to address their needs and comfort level.

*Returning Students in August: Because policies and procedures change throughout the years, it is important that parents have the most up-to-date information. Please contact your returning families with updated procedures and any additional questions. This is a yearly requirement with all families. This allows parents to get essential updates for the school year. You might also consider having a webinar for all of the parents on your roster to discuss any new policies and procedures and answer questions.*

Supplemental documents for this sections:

[Initial Parent Meeting Checklist](#)

[Parent Checklist: Getting Ready for School](#)

[Secondary New Student Checklist](#)

**Hand Out the Following Documents/Email in advance if the meeting is virtual**

1. Excel School Calendar- [2024-25 School Calendar](#) (Print in Color) available on the website or in EACS Handbook as well
2. [CCP Acknowledgement](#): This is signed by families in RegOnline, but if your returning students are unable to log back into their RegOnline account, feel free to email it to them.
3. [Acknowledgement of Responsibilities](#) (AoR): see section below
4. Course of Study template for information gathering: Shared Drive> Education folder > [ToR Resources](#)
  - a. You will add this information to the [Course of Study Elementary Doc](#) or the [Course of Study Secondary Doc](#) spreadsheet for review by your Regional Leader.
5. Course Content: (may be shown on your screen if virtual) Print course content for approved TK-8 and HS curriculum from SIS by clicking "view" and scrolling to the bottom to "print"

## Topics to Cover During the Meeting:

### 1. Acknowledgment of Responsibilities and Master Agreement

- ❖ Place the [Acknowledgement of Responsibilities](#) in front of you and go through it line by line with the parent. (located in SIS, along with the MA.)
  - ❑ This is absolutely crucial, as many parents get to a point in the semester where they are issued [Progress Improvement Notifications \(PINs\)](#) because they did not understand the policies set forth in our Acknowledgement of Responsibilities.
  - ❑ Review with families any new and relevant changes to our program.
- ❖ Explain policy changes for this school year that will directly affect parents, especially veteran parents.
- ❖ Have the parent sign the Master Agreement/Acknowledgement of Responsibilities for each child if it was not signed in the spring
  - ❑ Confirm the student information in SIS for accuracy (name, grade level, birthdate, telephone number, address, and email).
    - For inaccuracies, please email [admissions@excelacademy.education](mailto:admissions@excelacademy.education) with the corrections that need to be made. Email subject line: SIS Corrections
    - If the student grade level is wrong, you can have them sign an addendum later to correct this inaccuracy on the MA.

### 2. CCP Agreement (CCPA)

- ❖ [Go through this document thoroughly with your families](#), so they understand how funds work. Some of the most important items are:
  - Non-consumable items are the property of the school and must be returned.
  - Content and Community Providers (CCPs) may not have room in their classes. Parents/guardians must contact the CCP first to see if there is room for the student and ask that their place be held. Excel Academy does not pay registration fees.
  - CCP class orders must be received by the ToR **8 working days** before the first day of school. Teachers can enter the orders 7 days prior to the start of a course.
  - Materials will be shipped to parents as a default. Confirm this option and shipping address with them. In unique circumstances, some orders may need to come to you.

### 3. Curriculum (Course of Study)

- ❖ Discuss curriculum options with the parent. If the parent does not know where to begin, you may suggest the TK-12 Curriculum Menu. If the family does not find a curriculum through the menu, they may use the TK-8 Handbook/High School Course Catalog. **\*\*Students must have curriculum content and a pacing guide in place for each**



core course before the start of school.

- Fill out the [Course of Study Elementary Doc](#) or the [Course of Study Secondary Doc](#) with the parent, explaining areas that need another curriculum to fill in the gaps. Make sure to write down everything the student is using for curricula and check for gaps in learning (spelling, reading literature, writing). Families might need a few days to make final decisions.
- Parents/guardians must choose a complete curriculum, for all courses, within 5 days of signing the Master Agreement if school has already begun. ToRs must order curriculum for the student if a full week has gone by and the parent still has not chosen a Course of Study.
- For those that have curriculum in hand that they would like to use, take a picture of the [Table of Contents](#) for each course. You will need this to ensure it hits all standards for pacing purposes/AWRs.

#### 4. Pacing Guide

- ❖ The ToR must complete a Pacing Guide for all core subjects a student is taking. Explain to the parent their responsibility for following the pacing guide on a weekly basis.
  - Pacing guide [templates](#) can be found in the Shared Drive under Education and Curriculum.
  - ToRs may also send copies of the pre-loaded AWRs to families as pacing guides.
  - Families must receive their pacing guides before the first day of the learning period.
  - Help parents to understand what a 'body of work' is.
    - For in-person meetings, a body of work generally includes the entire text and/or workbook demonstrating the work completed in each Learning Period.
    - For virtual meetings, a body work generally includes the ToR asking for multiple samples to be sent ahead of time. The student will need to show the work completed by holding up completed work from a wide sampling. Workbooks may also be collected at the in-person meeting.

#### 5. Recording Student Learning

- Explain the options for parents to record student learning in preparation for the LP meeting each month.
- Parents should bring a copy of the Pacing Guide to each LP meeting, in order to reference the material the student completed. The ToR may need to adjust the Pacing Guide each LP for the parent/guardian and provide them with an updated copy.
- Tier System should be embedded here.

#### 6. Ordering: Parents must have an academic plan and all necessary curricula ordered

before the ToR can order supplemental courses (PE, art, field trips, etc.)

7. **Graduation Goals: (8th grade and up):** ToR must communicate that our goal is to have students graduate and meet graduation requirements. We recommend that all students begin the college a-g track so that they have the widest set of options when they graduate. This is why all students follow a-g curriculum. With either the college or graduation track, all students meet with a School Counselor to schedule classes. For specific and individual college requirements we remind families that the PARENT is responsible for contacting colleges of interest to clarify specific admission requirements. Use the generic HS MAs as a guideline for common courses by grade level.
8. **Start Date:** Inform the parent that a student's start date on the Master Agreement is the beginning of academic learning. It will be either the first day of school, or the date in which the family signs the Master Agreement (after school begins). Families must log academic progress for each subject/course from that point on (even if they start supplemental CCP classes at a later date.)
  - Please note: If a family wishes to start on a date later than their signature date on the MA, please contact Admissions and they will adjust the date in school pathways. The MA does not need to be redone.
9. **LP meeting location/time:** This must be a public location; no home visits are allowed for liability reasons. Make sure your LP meeting schedule is established and set before the first day of school. All LP meetings must be held during work days (M-F) and work hours (8:30am-4:30pm)
  - Read the section below on LP Meeting Scheduling before establishing your schedule. Elementary and Secondary pathways have different requirements.

## *LP Meeting Scheduling (Personalized)*

*\*Please note: At no time should families see the names of the other families you are meeting with on a shared schedule. It is easy to create confidential Calendar Sign Ups in Google Calendar for your LP meetings. See the following video tutorial for instructions!*

1. **LP Week:** Reserve the last week of the LP for your meetings. For example, if an LP ends on Friday the 5th, meetings should be held the 1-4th or the previous week. Refer to the ExcelSchool Calendar for school year LP dates. Reserve the Friday of LP week for make-up meetings and taking attendance.
2. **Elementary Pathway- alternating virtual and in-person meetings:** ToRs will alternate LP meetings between in-person or virtual on a rotating schedule. ToRs have some flexibility on how they meet this requirement.

- Some ToRs will hold in-person meetings for their full roster one month and the next month hold all virtual meetings for their full roster.
  - Others will split their roster in half and alternate which half of their roster they are meeting with in-person, each month.
  - Important: There will be certain ToR duties that must be done in-person. All due dates for these duties must be met, regardless of your in-person LP schedule.
  - .
3. Secondary Pathway- mostly virtual
    - Must either complete two in-person LP meetings, one in the first semester (should be near the beginning of the semester) and one in the second semester. Or, if all LP meetings are virtual, attend two additional in-person school functions to meet family and student in person; one in the fall and spring semester.
  4. Locations: Pick locations central to your families, doing your best to never make a family drive over 20-25 minutes except in special circumstances that the parent has agreed to ahead of time. Pick a location with ample seating and internet access if you want to work in between meetings. Keep families of small children in mind; the children might squirm and make noise.
  5. Duration: Meetings for single students should be 45 minutes at minimum. If there are multiple students in a family, schedule an additional 30-45 mins for each student, depending on grade level. It is always better to allow more time than to run out of time.
    - Families with a high school student should expect to give an entire 45-60 minutes for the high school student plus the amount of time needed for any remaining TK-8 siblings.
  6. Mandatory: Stress the importance that LP meetings cannot be rescheduled unless there is an unavoidable emergency. They should schedule other appointments around monthly LP meetings. Be kind, yet firm, setting the tone the first time you meet with the family. If a family arrives late, cancels or misses meetings, refer them to the policies in the EACS Handbook. If a family misses their meeting or fails to turn in work, a PIN may be necessary. Give the parent until the attendance deadline for each LP. If they still have not met with you and/or provided samples, follow the PIN process.,.

### The Scheduling Email:

*(All emails to families should be bcc'd so families cannot see one another's email addresses.)*

- [Create a Google Calendar appointment invite](#), with time slots for parents to sign up their children for an LP meeting. Give a cushion of 10-15 minutes between families to allow for transition time.
- Ensure that you have included the meeting location in the sign-ups.

*Make sure your email is friendly, and includes:*

- An explanation of what an LP meeting is
- The link to the calendar sign ups

- *A reminder that LP Meetings are mandatory and cannot be rescheduled, unless there is an unforeseen emergency*
- *Both the student(s) AND parent(s) are required to be at all LP meetings, no exceptions.*
- *Students must arrive on time for scheduled time-slots, or risk having it rescheduled.*
- *Meetings will last approximately 45 minutes per student, depending on grade level.*
- *Provide a list of what families should bring with them, or should have done prior, to the LP meeting.*

## *Virtual Path-Teaching and Monitoring*

*The Virtual Path ToR is required to set up their class in the Buzz LMS (BT or FlexPoint), in addition to setting the curriculum content in SIS for each LP. The Virtual Path Coordinator will check to ensure the classroom content is set in both programs for the year, prior to school beginning. Being organized and ready for the year will provide for a smooth year.*

*Monitoring of assigned work and communication with families is crucial in order to keep students on track. Diligence in the first few weeks can make a big difference for students that need a lot of structure to keep on top of the learning.*

### *Weekly Cycle of Monitoring*

*Assignments for each school week should be due Fridays at midnight each week that school is in session. However, teachers should set the assignments to allow for late submissions for students who wish to catch up over the weekend. If late submissions are not set to be allowed, it will require the teacher to go in and override each time a student turns anything in late, which is frustrating to the parent and the teacher. However, late assignments should not be accepted more than three weeks from the date it was due, except in rare pre-approved exceptions.*

*Each Friday, by the end of the business day, teachers should provide families with all assignments for the following week. The details of the communication should include:*

- 1. A Weekly Assignment Checklist (lists all assignments due by Friday at midnight the following week)*
- 2. Any labs, projects, etc. for which parents will need to prep*
- 3. Links to printables necessary for the following week*
- 4. Any other pertinent information (School-spirit days, field trips, modifications of the schedule, etc.)*

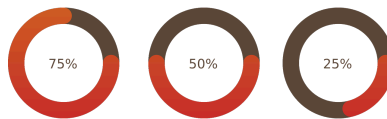
*Each Monday, or the first day of the work week, teachers should check Buzz to see if there are any missing assignments that students did not turn in on Friday or over the weekend. If a student has missing assignments, the teacher should notify the family of the specific missing assignments.*

- *Students missing more than 30% of the assigned work for the previous week may be subject to a Progress Improvement Notification. Confer with the Virtual Path Coordinator to determine if a PIN is warranted. (The first week that more than 30% of work is missing, issue a warning and a chance to catch up. If a family is going through a difficult life circumstance, be sure to extend grace where needed.)*
- *All students should be afforded the opportunity to catch up on late work. However, late work must be submitted to the teacher no later than three weeks following the due date, unless an exception has been made. After that, the assignment will receive a zero.*

*Part of monitoring students is providing the school with up to date class attendance information. This is done using the Engagement Calendar or Log in SIS. (See the [How to Use the Engagement Calendar](#) section)*

*All Engagement Calendars should be fully up to date by Friday, close of day each school week. Any student that misses more than three days of class, for any reason, should be brought to the attention of the Virtual Learning Specialist. Any student missing 5 or more days of school without prior approval must receive a PIN and the Principal should be notified immediately.*

5.



## *Progress Monitoring*

*The primary responsibility of the Personalized Path Teacher of Record is progress monitoring. This comes in many forms:*

- *Weekly check-ins*
- *Weekly monitoring of grid logs to document engagement*
- *Regular and timely communication with families*
- *Weekly monitoring progress in curriculum and/or online classes*
- *Learning period meetings (monthly or as needed)*
  - *Goal-setting*
  - *Monitoring completion of work outlined by the pacing guide*
  - *Measuring student academic growth*
- *Assigning additional work if needed*
- *Monitoring IEP goals, SST goals, and/or the implementation of 504/IEP accommodations*
- *Using Tier 1-core differentiation strategies to address academic needs*

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

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

### *Tiered Engagement*

*Excel has adopted a tiered re-engagement strategy, which is outlined in the Acknowledgement of Responsibilities signed as part of the Master Agreement. Students must engage in educational activities on a daily basis.*

*ToR steps for monitoring engagement:*

1. *Parents are required to mark daily engagement on the student's grid log, which will be reviewed by the ToR at the end of each LP.*
2. *ToRs are required to monitor school work on a weekly basis.*
3. *If proof of school work cannot be provided, the ToR will begin the [PIN process](#).*

#### *Synchronous Instruction and Live Interaction*

*Students are invited to participate in synchronous learning opportunities on a daily and/or weekly basis. Exact programming will vary year to year.*





## Learning Period Meetings

*Note: Learning Period Meetings only apply to the Personalized Path.*

*Learning Period (LP) meetings are required about every 20-25 school days by the State of California and are scheduled by the ToR based on the end date of Learning Period (LP). Generally, meetings occur the week an LP ends, but may be held earlier if needed. All meetings should take place before the last day of the learning period. That way, if there is an emergency, there is a chance to reschedule and take attendance before the deadline. (Please note: You are required to have all samples in-hand before taking attendance.)*

*REQUIREMENT: New ToRs are required to observe one learning record meeting of their Lead ToR before they meet with their families for LP1. These observations will be scheduled the week prior to LP1 meeting week. The Lead ToR will then schedule a time to observe the new teachers during their first two learning period meetings.*

*Each student's curriculum is paced out by the ToR for the school year with clear expectations for what the student is to complete each Learning Period (LP). The ToR, parent/guardian, and student will meet together to review the student's body of work and academic progress at the end of each LP. Students meet with their ToR monthly for their LP meeting. These meetings may be in person or online. TK-6 students will alternate LP meetings between in person and virtual. 7-12 students and families must meet with their ToR once each semester in person, in the fall and in the spring. The 7-12 in-person meeting requirement may be met during a Learning Period meeting, a field trip, or a school event.*

*Supplemental documents for this section:*

[LP Meeting Checklist](#)

[Parent LP Meeting Checklist](#)

[Work Sample Checklist](#)

[Forms for LP Meetings folder](#)



## Purpose of the LP meeting

*The purpose is to oversee and assess student progress towards proficiency in each subject by reviewing the body of work. In our independent study model, work completion is also tied to attendance. This can be a very rewarding part of the ToR position. It is a time to encourage students in their learning and offer parent support. Students and parents may start out very insecure, especially if they are new to independent study, so lots of encouragement may be needed. This is a time to reassure them that they CAN do this! Training parents in what is expected may take several LPs. However, when parents are trained well and follow expectations, you will have meaningful and productive meetings.*

### What does a meeting look like?

*The order of a meeting is flexible, but should include these components:*

- 1. Announcements/scheduling/pressing matters*
- 2. Review of the body of work completed that LP for each child*
- 3. Collect samples from every subject (ELA, math, sci, ss, PE, etc)*
- 4. Assign work for the upcoming LP*
- 5. Parent mentoring*

*For online meetings, it is highly recommended to create a monthly PP template so that every family receives the same information and to keep the meeting on track.*

### Objectives during a meeting

- 1. Review work to assess learning for participation, mastery, and attendance*
- 2. Review the Assignment and Work Record (AWRS) to gauge pacing.*
- 3. Collect samples to upload into SIS for compliance to match AWRS*
- 4. Assist parents in planning, pacing, and troubleshooting*

### Objective #1: Work Review to Assess Learning

*As a ToR, one way to assess student learning occurs during Learning Period meetings. Participating in student-centered discussions, based on the student's complete body of work, is a great way to connect with students and find out if they understand the material. Beforehand, ensure you communicate with your families the need to bring a body of work from each subject, not just a sample.*

- *Each student should take 30-45 minutes to review:*
  - *Take charge of the questions; don't let parent/guardian guide the conversation.*
  - *When possible, allow the meeting to be student-led to promote student advocacy.*
  - *Allow students to use their notes and samples to answer questions. It's not a test-- it's a conversation.*
  - *Try to engage with students separately or require they answer separately.*
  - *Use samples as a starting point for discussing and assessing mastery.*

*As students review their work with you, ask meaningful open-ended questions that include varying levels of complexity and critical thinking. Remain friendly and down-to-earth to build strong relationships. Don't unnecessarily quiz students or put them on the spot, but work towards assessing their knowledge in a variety of ways. You can work on math problems, listen to them read, have them explain concepts, and much more, based on their work from the month. The types of questions below can be helpful. (Please see [Questions to Check for Understanding Doc](#)).*

- *I see you learned about butterflies! Were you able to see real butterflies? Did you read a book about butterflies? Did you color any pictures or do a project?*
- *What steps did you take to create this final draft/project?*
- *What was the most interesting fact you learned about \_\_\_\_\_?*
- *What are you reading at home? Tell me about your favorite character...*
- *What do you think will happen next in the story?*

*\*\*It may take a couple of meetings to break the ice with some new students, but hang in there!*

#### *Assessing Learning in a Virtual Meeting:*

*During virtual meetings, ToRs should maintain high standards for assessing work. Students must still provide a body of work. They should have their workbooks/papers with them or have submitted them electronically. ToRs may need to use creative methods and leverage technology to assess student learning in a virtual setting. See the [Virtual LP Meetings and Training Resources folder](#).*

#### *Objective #2: Recording Learning for the LP:*

*Parents need to communicate the monthly learning that takes place for their student(s). They may use reflection logs, learning logs, or pacing guides to do this.*

While a pacing guide should be in place before the LP begins, at times students complete slightly more or less than what was planned. The easiest way to communicate the learning from the LP (about 20-25 school days) is to print out a pdf of the curriculum from SIS and have the family check off the completed assignments. To retrieve the pdf from SIS, follow these instructions:

1. Go to your roster PLS/Student Roster.
2. Scroll down to the student and expand the blue arrow on the left.
3. Click on the green dot next to the subject you would like to open.
4. For the curriculum entered for that subject, click on the "view" button to the right of the curriculum title. (This will open up a pdf that you can then save and print.)
5. Repeat this for each subject for each student. Talk and add notes to grasp a full picture of learning that took place for the LP.

For curriculum that is NOT in SIS, parents can communicate learning with a reflection log, learning log or by referring to the table of contents:

1. The Pacing guide is used to monitor the progress of a student each LP. The pacing guide ensures that the student is making adequate progress and completing the yearly requirement for each core subject. It is required for the ToR to communicate with the family on a weekly basis and make adjustments if necessary.
2. The Learning Log is found in the Parent Portal and can be used to record completed work
3. Table of Contents: Teachers can refer to the Table of Contents for that curriculum and take notes as you talk to the student. (Take a picture or Obtain a copy at the beginning of the year.)



### Objective #3: Collecting Samples to Upload into SIS for Compliance

During the Personalized Path learning period meeting, your goal is to take a variety of samples from the body of work. You can take paper copies or digital copies. Always take more than you'll need.

- Take lots of pictures with CamScan
- Have parents send multiple samples in each subject, in advance for a virtual meeting

TK - 8th: Review the entire body of work and and collect several graded work samples for each core subject listed on the MA:

- Language Arts
- Math
- Social Science/History
- Science

- *PE: Students may complete a PE Log or assignment, such as:*
  - *TK-2 A picture with a simple written description by a student or dictated and written by the parent/ToR.*
  - *Grades 3-5: A picture with 3-5 sentences of their PE activities related to the picture.*
  - *Grades 6-8: A paragraph or two about their PE activities*

*High School: Review the entire body of work and collect multiple graded work samples for each course title listed on the Master Agreement. High school students must be enrolled in a minimum of five to six courses per their approved four-year plan ([see High School section](#)).*

- *ToRs will meet with each family twice in person, once in the fall and once in the spring. If the family prefers the LP meetings to be held virtually, then these in-person meetings may be met via a field trip or other school event.*

#### *Objective #4: Assist parents in planning, pacing, and troubleshooting*

- *Leave time to answer parent questions about curriculum, lessons, and goals*
- *Briefly review the next month's goals/pacing*
- *Don't be afraid to ask for more samples, better quality, or assignments that cover missing standards/objectives*
- *Check in on additional programs your student participates in: WIN, ELD, SAI, GATE, etc.*
- *If the student has an IEP ask how accommodations are being met*
- *Ask them how you can help during the next LP*
- *Remind them that you'll be checking in weekly and that you need a response within 24 hours.*
- *Remind them about daily attendance*



### *Work Sample Requirements*

*Teachers in both pathways must upload a sample from each content area into the Student Information System (SIS) each LP. These samples must contain the following:*

- 1. Samples must be graded/marked:*

- a) Grades (6-12) Please include a letter grade, percentage, or fraction (all are okay) that indicates how well a student did on the assignment. If the student misses several questions on the assignment, but the page that is uploaded is free from error, it is advised to please write "page 1 of \_\_," at the top so that it is understood the missed questions occurred on the pages not included. (Stickers, stars, checks, etc.. are not acceptable substitutes for a letter grade.) \*
- b) Writing Samples: The sample should have comments and corrections throughout the piece, along with a letter grade from the parent/teacher, showing they have read through it and provided feedback to the student. High school writing samples earning an A should include a corresponding rubric.
- c) Grades (TK-5): Stickers, stars, checks or comments are acceptable forms of grading. A letter grade is NOT required. However, for math, students should show their work and wrong answers should be clearly marked. Ideally you will include the amount incorrect at the top of the paper, but again not required. (ie. -4 or 6/10)

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

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

- a) Acceptable Samples:
  - i) A picture of a science lab, accompanied by a lab write-up, detailing what the student learned.
  - ii) Math homework in which all the student computations are shown (not just answers).
  - iii) Multiple choice or T/F worksheets that include open response questions.
- b) Unacceptable Samples:
  - i) A photograph of the student completing a lab with NO write-up
  - ii) Multiple choice or T/F exams or worksheets
  - iii) Maps or coloring pages not accompanied by a brief description;
  - iv) Math homework which shows only the answers.
- c) For very young students (TK and K), the parent may dictate what the child says. Have them use quotation marks to indicate it was a dictation. Once the student is able, they should be encouraged to write independently.

3. Samples must be non-religious - please double check the content, as well as the publisher at the bottom of the page.

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

- a) *Equally important is showing a progression of work. For example, a 1st grade student may start with copy work samples and by the end of the year be writing original paragraphs.*
- b) *Do not accept the same type of sample each Learning Period. For example, language arts includes writing, reading comprehension, spelling, etc. Do not upload a spelling test for each Learning Period sample.*
- c) *A student's BEST work does not necessarily mean it will be an "A" on every paper. Get to know your students and what they are capable of and educate parents that an "A" is above grade level work.*

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





# Withdrawal Process

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

Summer Months: No withdrawal form is needed for students that decide not to enroll during the summer months while Excel Academy's school year is not in session.

Simply notify the following staff members:

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

## Withdrawals During School Year:

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

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



## *Discipline - PINs and BIPs*

### *Progress Improvement Notifications (PINs)*

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

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

### *How Do I Know When to PIN?*

*Students and parents are responsible for complying with the responsibilities as outlined in the Master Agreement, Acknowledgement of Responsibilities, and other independent study policies. If you feel that a parent or student has failed to comply with Excel Academy expectations and policies, please contact the Elementary Vice Principal, Secondary Vice Principal, or Virtual Learning Specialist respectively prior to issuing or suggesting a PIN.*

[Click here for the PIN Template](#)

*\*Instructions are included in the PIN Template*

*Some of the most common reasons PINs are issued:*

1. *Lack of work completion or failure to show work completion.*
2. *Failure to attend a learning period meeting or another mandatory school meeting. Allow a make-up for the first missed meeting.*
3. *Missed classes or no communication for more than 5 school days, despite teacher attempts at contact by phone and email.*
4. *Late cancellation of a meeting or cancellation of more than two required school meetings for non emergency reasons.*
5. *Failure to complete required WIN and/or ELD assignments.*

### [Weekly Check-Ins and PINs](#)

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

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

#### [Levels of Support](#)

### [Attendance](#)

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

### [Completion of PINs](#)

*It is the ToR's responsibility to fill out all PINs. PIN templates are located in the Shared Drive, in the Dept. of Education Folder, then PIN Template Folder. One PIN template can be used for all types of PINs. Detailed directions are on the [PIN Template](#). Always make a copy of the template and save it to your Drive before continuing with filling out the information.*

- *ToRs will send the first PIN.*
- *Any time a second PIN is issued, an AIM meeting will be required. In rare cases an SST may be held in lieu of the AIM meeting to ensure the student is being supported adequately. The respective department will make this determination and will inform families for which meeting they should attend. After receiving two PINs, a Best Interest meeting may be scheduled to review if the non-classroom model is an appropriate learning environment for the student.*
- *If a student receives three PINs and a Best Interest meeting is conducted in one school year, a third party review may be held by the respective Elementary or Secondary*

*Principal in conjunction with the parent, ToR, and a neutral third party to see if independent study is in the best interest of the student. The determination is final and immediate.*

- *For students receiving special education, an IEP team manifestation meeting is required before any third party review is requested or held.. SPED Program Specialist should be made aware of all PINs being issued to students with IEPs. Students with IEPs may not be referred to third party review until after the IEP meeting is held to discuss the impact of the student's disability.*

## ***Behavior Improvement Plans***

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

[\*Click here for the BIP Template\*](#)

*Elementary - send to Elementary Principal*

*Secondary - send to Secondary Vice Principal*

*Virtual - send to Virtual Learning Specialist and the appropriate Principal*

*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 receive an F on the assignment. A third offense may result in the student being withdrawn from the class. 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 Handbook.*

*Excel Academy has reviewed Education Code Section 48900 et seq., which describes the non charter schools' list of offenses and procedures to establish its procedures for suspensions and expulsions. The language that follows closely mirrors the language of Education Code Section*

*48900 et seq. The Charter School is committed to annual review of policies and procedures surrounding suspensions and expulsions and, as necessary, modification of the lists of offenses for which students are subject to suspension or expulsion.*

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



# High School

## HS Terms

*Course Title: The course title is the general name recognized for what your student is taking, these are the required courses over the 4 years of high school.*

*Ex: CP English 9 A/B, CP Algebra 1 A/B, CP Biology w/lab A/B, CP Visual Arts, CP Spanish 1*

- *Course titles are what the state refers to when we must report which courses our students are enrolled in each year.*

*Class Name: The class name is specific to the class they are taking.*

*Ex: EDG English 9.*

- *Class names are what are shown on the report card and transcript to distinguish curriculum, CCP, or transcript distinctions..*

*Curriculum Content: The scope and sequence of a course. These contain the objectives and corresponding assignments for each unit and should align with the state standards.*

*CoCo: Compliance Coordinator - Each of teachers who have been assigned either a grade level band or a subject area to review monthly work samples and AWRs.*

*HQT: Every teacher who holds a valid, single-subject credential is a Highly Qualified Teacher.*

*Pacing Guide: A division of the curriculum content into monthly requirements to ensure that students complete the scope of the work in one school year. The curriculum content in SIS may serve as the pacing guide. ToRs need to download the CC from the SIS, indicate work to complete per LP, make a copy, and share with the student and family.*

*Acceptable Samples: Student work that is acceptable to collect as monthly samples. These include:*

- A unit test-strongly prefer that it comes from the publisher or course. All assessments must demonstrate junior high or high school level rigor. Final determination on acceptance will be determined by the CoCo.
- A final draft multi-paragraph essay or paper on a related topic. Paper must follow MLA formatting rules. Papers/essays are required twice a semester.
- A rough draft of an in-progress paper - a final draft is always preferred and cannot use final draft for future sample. ToRs need to ensure a final draft is completed.
- A lab write-up (science courses only) - must include title, intro/purpose, materials list, method, data, results, analysis, conclusion, and graphs or figures, if applicable. Refer to a [Lab Report Template](#). Labs are required twice a semester (LP 2, 4, 6, & 8)
- A project/presentation showing significant learning and application.
- A book report with critical analysis - may not be a simple summary.
- A written copy of a student-written speech or an oral presentation.
- Answers to a section of chapter questions or a chapter review.
- A timeline or map that clearly reflects junior high or high school level work/detail.
- A reflective paper (VAPA).
- Another junior high or high school-level sample as agreed upon by ToR/parent/student in advance.

## Pacing Guide Dates

### Fall Semester – starts August 22nd

9/23/24	25% complete (21 days)
10/23/24	50% complete (20 days)
11/22/24	75% complete (23 days)
11/25-11/29	Thanksgiving break
12/20/24 -1/3/25	Winter break
1/17/25	100% complete & online finals have been completed (24 days) Finals for EDG, FLV, UC Scout Last day of Sem 1

### Spring Semester – January 21, 2025

1/20-1/24/25	Career and College Readiness Week
2/21/25	25% complete (21 days)
3/21/25	50% complete (21 days)
4/7-4/11	Spring break
4/25/25	75% complete (21 days)
5/2/25	Schedule finals
5/23	Grads- 100% complete



5/30                      7th-11th 100% complete  
                                  (22 days)  
5/30                      Grad//Last day of  
                                  school

**Important Sample Due Dates:**

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

Week 1 - samples input

Week 2 - AWRs completed by Friday

Week 3 - CoCos check

Week 4 - Learning Period meetings

## **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 Semester - September 6, 2024

Spring Semester - February 3, 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 10/11/2024 for fall semester or 3/21/25 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. Please speak with a counselor before dropping a senior class, as this can impact dashboard data and college enrollment.

- The minimum & maximum course policy is in place to ensure academic success.
- The minimum number of courses that high school students can register for is 5-6 courses per semester depending on the student's respective grade level (see graduation track options below for details).

- *12th graders who have earned 180 credits prior to the start of their senior year, can register for 4 courses per semester, equaling 40 credits for the school year.*
- *If a student is participating in concurrent enrollment, then a minimum of 4 Excel Academy high school-level courses must be taken each semester they are registered for a college course.*
- *The maximum number of courses high school students can register for is 8 courses per semester including concurrent enrollment courses. See below for concurrent enrollment requirements.*

## Understanding A-G

- [\*A Parent's Guide to A-G Requirements\*](#)
- [\*UC/A-G subject requirements\*](#)
- [\*UC admissions requirements\*](#)
- [\*CSU admissions requirements\*](#)

### A-G Protocol:

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

## Community College Courses

### **Community College Courses - Concurrent Enrollment Policy**

*Students may request concurrent enrollment courses by following these steps:*

1. *Students and parents/guardians discuss concurrent enrollment options with their ToR.*
2. *ToR will discuss eligibility requirements which include the following: Students must have a minimum 3.0 GPA for academic courses or a 2.7 GPA for elective/vocational courses. Students must show college readiness in their respective core courses (ie. each community college sets their own prerequisites for determining high-school eligibility). 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 reinstate the process.*
12. *Students must be aware and adhere to all college rules and regulations.*

13. *In order to confirm the course will transfer to the university of the student's choice, please consult with a Community College Counselor.*
14. *Per the Community College regulations and the CDE, only 5% of Excel Academy students per grade level can attend a community college during the summer. Priority approval will be given to those needing courses to graduate.*
15. *If a student is found to enroll in a college course that has not been approved by the School Counselor and does not meet Excel Academy's prerequisites for college courses, even if the student completes the course, they will not earn dual credit. The student will earn college credit but not high school credit. The student will be required to complete the respective high school course for graduation purposes.*
16. *Students will only receive dual college credit in courses that have prior approval from the School Counselor. This MUST be pre-approved via the concurrent enrollment form.*
17. *Grades from any concurrent enrollment course will not be reflected on the Excel Academy transcript until the official college transcript has been received and verified. 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 Department  
1 Technology Drive, Ste. I-811  
Irvine, CA 92618*

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

### ***Honors Courses Process & Requirements:***

*Honors courses are designed to be more in-depth, challenging, and rigorous. 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:*

1. *ToR will discuss honors options with students and family*
  - a. [High School Honors Requirements](#)
  - b. [Junior High Honors Requirements](#)
2. *Student requests to register for an honors course*
3. *ToR completes [Advanced Course Request Survey](#)*
4. *HS department verifies eligibility for a student to enroll in advanced coursework.*

5. *Honors courses require quarterly projects (see above dates). 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.*
6. *ToR will assist students in meeting additional honors requirements*
7. *Honors credit will not be issued retroactively post the 10-day add/drop window*
8. *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.*
9. *Transcripts from the online provider may be required to receive credit.*

### **AP Courses**

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

1. *ToR will discuss AP options with students and family*
2. *Student requests to register for an Advanced Placement course*
3. *ToR completes [Advanced Course Request Survey](#)*
4. *HS department verifies eligibility for a student to enroll in advanced coursework*
5. *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](https://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.*
6. *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.*
7. *Transcripts from the online provider may be required 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) or two courses in the same subject simultaneously (i.e. English 9 A/B and English 10 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.*

1. *ToR will discuss advanced course options with student and family*
2. *Student requests to register for an accelerated course*
3. *ToR completes [Advanced Course Request Survey](#)*
4. *HS department verifies eligibility for a student to enroll in advanced coursework*

5. ToR will aid the student in choosing curriculum that would work for this designation or follow the process for concurrent enrollment
6. ToR will pace out the first semester into the first quarter to ensure students understand 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 Handbook](#) with the exception of in-person provider courses.

### *Junior High students:*

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

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

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

And at least one of the following:

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

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

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

*All junior high students may enroll in a junior high or middle school level language course using instructional funds without the need for approval from the high school department. No credit will be given on the transcript.*

*Junior high students may submit the requested high school 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 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.*

### **Sample Compliance:**

- 1) *Include the student's first name as it appears on MA - This can also be a nickname, if it makes sense. For example, Michael may appear on the MA, and Mike is fine for the sample. If the student's name is Jennifer and they write Carol, that will not work.*



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



## *The Compliance Coordinator (CoCo) Team and their role in helping ToRs*

- 1) *Checking curricula – Compliance Coordinators, in conjunction with the Education Coordinators will verify if the new curriculum is acceptable to use. Checking state standards – All curricula needs to adhere to the current CA state standards. The CoCo for each specific subject will verify that the course closely aligns with the state standards.*
- 2) *Checking monthly samples -Every month the CoCos look at each uploaded junior high and high school sample to review for compliance and credibility. Each sample is either accepted or rejected. When you open the SIS and notice a rejected sample notification, this is a notification that changes need to be made to the sample. Enter the sample section and click on the rejected sample. A note from the team will indicate what needs to be corrected. Please make the correction/s and reupload the new sample. There is no need to email the CoCo that your sample has been corrected.*

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

*English – Forest Muther  
Math – Wendy Pendergraft  
PE - Lisa Durham  
Science – Kim Platler  
Social Studies – Jill Stowe  
Spanish – Jill Stowe  
VAPA – Colin Mcatee*

### *ToR Responsibilities –*

*Each ToR is responsible for the following:*

- 1) *Helping new students [HS New Student Checklist](#)*
- 2) *Ensuring every student uses an approved curriculum from [HS Curriculum Handbook](#)*
- 3) *Filling out the [Course of Study Elementary Doc](#) or the [Course of Study Secondary Doc](#)*
- 4) *Adding course name to MA - [TK - 12th missing student classes/curriculum](#)*
- 5) *Bring the following to your first meeting: Curriculum Content for each course, copy of the [Plagiarism Academic Honesty Pact](#) for each student to sign, [Parent Letter and Google Fact Sheet](#).*
- 6) *Creating a [Google Classroom](#)*

- 7) *Creating a pacing guide for each course*
- 8) *Weekly checking online course work; highlighting which items have been completed; identifying which items student plans to complete for the next month*
- 9) *Monitor monthly progress for both online and textbook courses.*
  
- 10) *Viewing a body of work and collecting multiple samples (may need as backup)*
  
- 11) *Ensuring that students submit two essays each semester to Turnitin to run through the plagiarism checker. Additionally, two science labs are required each semester as monthly samples.*
  
- 12) *Discussing grades ~ current progress & anticipated progress – keeping a written log or gradebook*
  
- 13) *Providing support to [struggling students](#) using [the levels of support spreadsheet](#)*
  
- 14) *Identify any high school students working at a 70% or below on a [monthly progress doc](#).*
  
- 15) *Keeping written log of concerns in the SIS Student Notes (this will make any SST meeting much more successful and productive)*
  
- 16) *Students are required to take one CHYA course in junior high and once in high school. Parents can [OPT OUT](#) via email/letter. Place in SIS notes and archive.*
  
- 17) *Reviewing each sample for the following – proper heading, legible, enough work to merit a passing grade, no religious content, incorrect answers or work are marked accordingly, and an accurate grade with rubric when needed*
  
- 18) *Proctoring A-G online final exams in the fall and spring.*
  
- 19) *Volunteer for one activity for either the fall/spring Parent Power Up.*

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

*Links for easy access to high school course information:*

[HS Course Course Catalog](#)

[HS Curriculum Handbook](#)

[A-G Courses](#)

[How to Handle Plagiarism](#)

[Google Classroom Instructions](#)

[High School Virtual Course Schedule](#)

[Excel Academy Charter School Handbook](#)

[Online CCP Price List & Ordering](#)

[Q & A HS Doc](#)

*For more information on high school related items, please review the various folders in the HSD section of the Shared Drive before reaching out to the admin team for questions.*



# Assessments

## Assessment Section Overview

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

## Shared Drive Assessment Folder

### Alternative Assessment Directions Folder

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

### Assessment Folder

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

### Goal Setting Folder

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

### i-Ready Information Folder

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

#### *TK Benchmark Assessment Folder*

*Fall and spring assessment directions, assessments, and answer keys are available.*

#### *Math Placement Tests Folder*

- *Algebra and Geometry Placement Tests - administered by the ToR*

#### *PFT Folder*

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

#### *Report Card Folder*

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

#### *ToR Student Tracking Spreadsheet Folder*

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

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

## ***Report Cards***

*Report cards are required for students in grades TK - 12. Please have the necessary discussions with parents prior to grading so parents are aware of the grades prior to receiving the report card(s). The grades administered on the report card are final, as determined by the ToR and the*

administration. Please refer to the Grading Scales document (included in the handbook and shared assessment folder) and the directions for administering grades.

## Grading Scales

### TK-5 Students

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

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

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

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

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

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

### Grades 6 – 12

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

*\*Outstanding performance in mastery of the subject. Achievement of superior quality.*

98 - 100 = A+

93 - 97 = A

90 - 92 = A-

*\*Consistent performance in achievement beyond the usual requirement. Achievement of high quality.*



*88 - 89 = B+*

*83 - 87 = B*

*80 - 82 = B-*

*\*Performance meets grade-level standards and expectations. Achievement suggests sufficient understanding of the subject/course.*

*78 - 79 = C+*

*73 - 77 = C*

*70 - 72 = C-*

*\*Minimally acceptable performance of course-level material. Achievement suggests below-average understanding.*

*68 - 69 = D+*

*63 - 67 = D*

*60 - 62 = D-*

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

*59 and below = F*

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



## OPTING OUT OF STATE TESTING

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

*Q: Are there specific forms approved for opting out?*

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

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

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

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

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

*Please reiterate the following message to parents/guardians.*

*Effective during the 21/22 school year, if CAASPP participation rates fall below 95%, our charter school will suffer significant penalties when it comes to reporting the school's performance measurement. Students who do not participate in testing will ultimately be assigned the lowest scale score possible which will hinder the overall performance score of the school. Charter*

*Schools who are designated as low performing are subject to non-renewal. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families. We want to work together to continue to provide a one of a kind top notch educational experience for our students.*

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

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

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

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

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

**\*\*\*IMPORTANT\*\*\***

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

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

- 1. DO NOT mention the alternative assessment prior to having parents understand the importance of state testing.*
- 2. We DO NOT want our Excel Academy families to choose the alternative assessments in lieu of state testing.*
- 3. Excel Academy DOES NOT receive participation credit from the state of California for these internal assessments.*
- 4. CAASPP results are reflected on the state's dashboard, not internal assessments.*

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

*What is an alternative assessment?*

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

*Where do students take the alternative assessments?*

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

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

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

*Yes, the Director of Operations and Accountability will need to be informed by the ToR that the student is taking the alternative assessments either at the specific location (in person) or via*

Zoom (virtual) and the specific dates to ensure that the Director of Operations and Accountability provides the assessments on time.

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

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

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

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

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

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

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

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

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

Letter **MUST** include:

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

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

## *State and Local Assessments*

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

### *Standardized Testing*

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

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

*Charter schools exist in a performance-based accountability system where they are held accountable for student academic performance. In fact, a charter school cannot continue to exist without collecting data on students' performance on a variety of assessments and indicators. When a charter authorizer is evaluating whether to revoke a school's charter, or to grant a school's charter renewal petition, "increases in pupil academic achievement" is the most important factor in the decision. (Ed. Code, §§ 47607(c)(2), 47607(a)(3)(A).) Therefore, it is important during the revocation and renewal processes for a school to gather as much positive academic achievement data as possible to show progress in student performance. Evaluating graduation, attendance, suspension, and English Learner (EL) reclassification rates are also ways to show student progress. However, student participation and performance on state mandated assessments is by far the most common and used method, and results are indicated on the California School Dashboard and System of Support. The Dashboard is a powerful online tool to help districts and schools identify strengths and weaknesses and pinpoint student groups that may be struggling (<https://www.cde.ca.gov/ta/ac/cm/>). Your*

student's participation in state mandated assessments is highly encouraged and recommended. Please remember that results and attendance from all state tests are directly tied to school funding per recent LCFF legislation and are an integral part in maintaining partnerships with our chartering school districts.

If you have any questions, please contact Excel Academy's Director of Operations and Accountability, Jenny Craig at [jcraig@excelacademy.education](mailto:jcraig@excelacademy.education).

### Proctoring

- ToRs will proctor the i-Ready assessments virtually. For specific details, see Assessments-ASMT > i-Ready Information
- - i-Ready proctoring will be done by ToRs
  - Testing window #1 - 8/26 - 9/6 - ALL K- 11th GRADE STUDENTS
  - Testing window #2 - 12/9 - 12/13 OPTIONAL FOR WIN AND SHORELINE STUDENTS & THOSE WHO CHOOSE TO TAKE A MID-YEAR ASSESSMENT
  - Testing window #3 - 3/24 - 4/4 - ALL K - 11th GRADE STUDENTS
  - Each testing window will begin with 5 days for math, 5 days for reading, and 5 days for make-ups.
  - ToRs will create their own schedules for testing (i.e. block two hours per day for students to attend a Zoom session - students will login on their own) It is highly suggested that ToRs test students the first two weeks of each window and team with other ToRs to proctor.
  - As of July 18, 2021, Google Chrome Versions 80 and below will no longer be able to access the i-Ready Platform. Students will have access to borrowing an EACS computer if needed.
- ToRs will proctor CAASPP assessments - April - 1:1 Testing - Dates TBD - General Testing - End of April into the beginning of May - Dates TBD
  - CAASPP proctoring days will be based on student enrollment and the need of 1:1 test takers. The SPED team will proctor students with 1:1 accommodations provided the students have current IEPs. The number of necessary ToR proctoring days assigned are not set at this time if the state moves forward with in person testing. If EACS continues with virtual testing, ToRs will resume testing students on their own. It is highly suggested that ToRs work with other ToRs to create a schedule and share the proctoring responsibilities.





## *English Language Proficiency Assessments for California (ELPAC)*

*The English Language Proficiency Assessments for California (ELPAC) is aligned with the 2012 California English Language Development Standards. The ELPAC consists of two separate assessments: one for the initial identification of students as English Learners (ELs) and a second for the annual summative assessment to measure a student's progress in learning English and to identify the student's level of ELP ([cde.ca.gov](http://cde.ca.gov)).*

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

### *English Learners (ELs)*

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

- *Excel Academy students are in an English Language Mainstream academic program with an English Language Development (ELD) Support Curriculum. The mainstream curriculum is taught and/or supported by CLAD certified teachers and includes vocabulary and visual thematic-based support. ELs are accommodated within this curriculum by providing multiple opportunities to demonstrate mastery on all assessments, including writing assignments.*
- *Progress in their assigned ELD curriculum is monitored weekly by the ToR. Excel Academy requires students to participate in both synchronous and asynchronous instruction for a total of 150 minutes each week. Questions pertaining to ELD curriculum can be directed to Tamara Murphy, Intervention Coordinator.*
- *Both the parent, as the primary educator, and the ToR are responsible for ensuring adequate progress through the ELD curriculum.*

### *Criteria for Reclassification to Fluent English Proficient (RFEP)*

*In order to be reclassified to Fluent English Proficient (FEP) and exit the EL program, students must meet the following criteria:*

- *Minimum ELPAC overall score of 4*

- *Teacher Evaluation*
- *Parent Approval*
- *CAASPP - Smarter Balanced and/or Local Assessments (i.e. i-Ready) can also be used in determining student readiness for redesignation*



## **CAASPP - California Assessment of Student Performance and Progress**

### **California Science Test (CAST) – Computer Based Assessment**

- *The California Science Test (CAST) is an online test based on the California Next Generation Science Standards (NGSS).*
- *Participation in the CAST is required for all students in grades five and eight and for the pre-selected high school grades.*
- *All local educational agencies (LEAs) with eligible students in grades five and eight will administer the CAST. LEAs with eligible students in high school (i.e., students in grades ten, eleven, or twelve) will be pre-selected to participate in the spring assessment. The CAST uses the current California Assessment of Student Performance and Progress test delivery system and will only be administered online ([www.caaspp.org](http://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](http://smarterbalanced.org)).*

- *Grades 3 - 8 and 11*
- *ELA and Math – Computer Adaptive Tests (CAT)*
- *ELA and Math – Performance Tasks (PT)*
- *CAASPP - SBAC spring testing - Dates and Locations TBD*
- *Registration for the SBAC ELA/MATH/CAST will take place with the ToR. Information will be emailed to parents in February.*
- *At testing sites, whether in person or virtual, cell phones are highly discouraged, and no electronic devices are allowed during testing, including smart watches.*
- *If testing is in person...*
  - *Parents are notified when students have completed testing by a proctor at the site.*

- *Parents are welcome to stay in the waiting area at most sites, but are not allowed in the testing rooms.*
- *Technology usage by students is prohibited in the designated testing areas.*
- *Photo ID may be required at pick-up.*
- *Siblings picking up students MUST be old enough to have a photo ID and must be identified at the time of check-in.*
- *Students may bring water and lunch to testing in a clear bag. Backpacks are not allowed.*
- *Students will be encouraged to take breaks during testing (i.e. restroom and snack breaks).*
- *Parents MUST review this information with their students.*

### *Student Testing Participation Requirement*

*All students currently enrolled in Excel Academy are required to participate in the aforementioned tests (where applicable). Failure to participate or satisfy the above requirement with alternative paper-pencil assessments will result in Progress Improvement Notifications (PINs) being issued to the student. Please refer to Excel Academy's Progress Improvement Notification Policy and Opt Out Protocol document in the ToR manual. [ToRs will need to reach out to the Director of Operations and Accountability to issue a PIN.](#) Once approved, the ToR will follow the guidelines of administering a PIN.*

[Smarter Balanced Assessment Consortium \(SBAC\) and California Standards Tests \(CAST\) for Science](#)

*Please refer parents to the CAASPP Practice Tools for Students document located in this manual, as well as the parent and student handbook and Excel's website. All ToRs should provide this document to their families prior to testing.*

*Please note that some of the practice tests do not provide answers or a score; however, it does provide your students with the experience of navigating through a sample test session, which is important to practice.*

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

[Physical Fitness Test \(PFT\)](#) – *Testing will take place in May*

The Healthy Fitness Zone standards are available on the California Department of Education Physical Fitness Test FITNESSGRAM: Healthy Fitness Zone Charts Web page.  
<http://www.cde.ca.gov/>

## OPTING OUT OF REQUIRED ASSESSMENTS

*Can parents opt out of the Physical Fitness Test (PFT) according to the California Department of Education?*

*The answer is no. There will not be an alternative assessment given in lieu of the PFT; therefore, the student will earn a PIN for not participating.*

*The general opt-out provision of California Education Code Section 60615 does not apply to the PFT. There are a limited number of allowable reasons for not participating in parts or all of the PFT (e.g., medical excuse, student with disabilities); therefore, most students cannot be excused from the PFT.*

*Can parents opt out of the ELPAC?*

*The answer is no. EL students will continue to be classified as English Learners until they pass the ELPAC as Reclassified Fluent English Proficient (RFEP).*

*Can parents opt out of i-Ready benchmark diagnostic assessments? The answer is yes, HOWEVER, ToRs need to discourage opting out of the i-Ready benchmark assessments because the data provided is valuable for the progress and growth we want our students to achieve. i-Ready provides data that will assist with course planning, curriculum and materials, SST evaluations, IEP evaluations, and data that can be shared with the Governing Board and districts holding Excel Academy's charters. **If a student opts out of i-Ready and does not complete the assigned alternative assessments in ELA and math, a PIN will be administered.***

*Are there alternative assessments that ToRs need to offer if parents opt out their student(s) from taking the i-Ready benchmark assessments?*

*YES! If parents choose to opt out of the i-Ready benchmark assessments, alternative paper pencil assessments in reading and math MUST be offered to avoid earning a PIN.*

*One PIN will be administered if a student does not take both required assessments (either i-Ready or alternative paper pencil assessments) during the set testing windows.*

*Who administers the paper pencil alternative assessments?*

*The ToR will administer the paper pencil alternative assessments.*

*What is the process to obtain the paper pencil assessments?*

*The ToR will need to notify the Director of Operations and Accountability and request the paper pencil assessments through a shared Google document.*

- *name(s) of student(s)*
- *grade level(s) of student(s)*
- *reason for not taking the i-Ready benchmark assessments*

*The Director of Operations and Accountability will email the assessments to the ToR and the ToR will make arrangements to proctor the tests in person or virtually at an LP meeting or another time and location.*

*Who will grade the alternative assessments?*

*Directions for administering and grading the alternative assessments are located in the shared assessment folder.*

*The ToR will be given the answer keys to the assessments provided by the Director of Operations and Accountability. A grading template will be shared with the ToR to complete and provide to the parents.*

*ToRs of EL students will need to provide the results on the shared spreadsheet, as well as to Jenny Craig. Tamara Murphy and April Saade will need to be informed of any student who falls below grade level and is in need of support and interventions.*

**\*\*\*IMPORTANT\*\*\***

*The alternative assessments do not provide the same level of feedback and results as i-Ready. Although the alternative assessments will provide necessary grade level information, i-Ready benchmark assessment results provide a greater, in-depth understanding of the students progress and gaps seen across grade levels due to the fact that i-Ready tests are adaptive diagnostics, and result in individualized lessons to assist students further.*

*Furthermore, ToRs should highly encourage their students to complete the individualized i-Ready lessons.*

### *Assessment Guide for Parents*

*ToRs are responsible for providing a copy of the Assessment Guide for Parents (included in handbook) to each family at the first LP meeting. This form shows the tests that are required at each grade level. \*\*\*Parents/guardians will Docusign this document along with other essential forms; however, it is important to review the assessments in person.*

- *The ToR will indicate the students' names next to their grade levels and highlight the required assessments.*

- *One copy per family.*
- *Parents must sign the form indicating they have been notified of the required assessments.*
- *This document is a great tool for parents to refer to and begin a conversation about assessments. The parent will take the signed copy home.*

# Testing Resources

For additional information regarding assessments, please refer to Excel Academy's website under *Our Academy and Assessments*. For CAASPP AND ELPAC practice tests, please refer to *Parent Tools and Assessment Resources*. Excel Academy provides the following resources to students:

- *Online practice tests links*
- *EACS created grade level paper pencil assessments in ELA and math*
- *Virtual test prep sessions*

## CAASPP Testing Security Form - If testing in person

ToRs must have each family complete one CAASPP Testing Security Form once families have registered for state testing. This form will be kept at the testing location in case of an emergency.

- *The Director of Operations and Accountability will notify all ToRs when the forms are due.*

## Proctoring of State Assessments

*Virtual Testing:*

*ToRs are highly encouraged to work with other ToRs to create virtual testing sessions that are flexible and offer students choice in terms of available times. Multiple sessions over the course of the testing window should be offered to best meet the needs of all students. **ToRs are 100% responsible for ensuring the completion of their students assessments.***

*In Person Testing - IF APPLICABLE*

*Each year, Excel Academy participates in state testing at various locations throughout Southern California. The Director of Operations and Accountability works to organize testing locations and a proctoring schedule that best meets the needs of all students. For this reason, it is essential that we have ToRs working together to assist our students. Depending on the number of students registered for the testing sites, Excel Academy teachers will be assigned proctoring days based on student needs. While we try to place teachers at the closest locations to their homes, there will be times when teachers will need to drive quite a distance to proctor at various locations. We try to inform everyone of these location assignments well in advance, in order to allow for scheduling and childcare arrangements.*

*While we completely understand that sickness is out of the control of the teacher, and a teacher may be sick on an assigned proctoring day, it is the responsibility of the teacher to find*



someone to take his/her place. In addition, the teacher will need to take a sick day in Paycom and also proctor on another date to make-up for the missed proctoring day. If the teacher is unable to swap proctoring dates with another colleague, please note that the make-up proctoring day may or may not be at the same location, and could possibly be during make-up testing. The Director of Operations and Accountability will do their best to place the teacher where they feel is necessary and in the best interest of the students. Make-up testing days will be scheduled once the coordinators solidify the number of students needing to test and the locations for testing. State testing is indeed a positive experience and would certainly not be as successful without the support of our Excel Academy Team.



## Physical Fitness Test – California

The PFT provides information that can be used by (1) students to assess and plan personal fitness programs, (2) teachers to design the curriculum for physical education programs, and (3) parents and guardians to understand their children's fitness levels. The program also provides results that are used to monitor changes in the physical fitness of California students. By law (Education Code (EC) Section 60800 public schools are required to administer the PFT annually to all students in grades 5, 7 and 9 ([cde.ca.gov](http://cde.ca.gov)).

- [Grades 5, 7 and 9](#)
- [TESTING IN MAY](#)
- The PFT is administered by the ToRs. ToRs will provide Excel Academy's Director of Operations and Accountability with the results for each student tested. A data collection form will be provided prior to testing.
- Accommodations for Special Education students will be outlined in their IEPs or 504 Plans.
- If a parent states a student needs additional support, the ToR will need to notify the Director of Operations and Accountability to verify accommodations.

### Testing Includes:

1. Aerobic Capacity – One Mile Run
2. Abdominal Strength and Endurance – Curl Up
3. Upper Body Strength and Endurance – Push Up
4. Trunk Extensor Strength and Flexibility – Trunk Lift
5. Flexibility – Shoulder Stretch

## 6. Recording of Height and Weight

### [PFT Collection Data Sheet](#)

ToRs are responsible for administering the PFT assessment to the students on their individual rosters in grades 5, 7, and 9. Specific details will be provided to all ToRs by the Director of Operations and Accountability in advance in order to begin preparation for testing.

Please plan a day and location (i.e. convenient park) to assess your students' ability to run a mile, to do curl-ups, trunk lifts, push-ups, and the shoulder stretch. **ToRs may not assist the students on any of the exercises. This includes holding feet down during curl-ups. All exercises MUST be completed solely by the students. In addition, parents are not allowed to test the students or assist with testing while students are taking the PFT assessment.** Please refer to the PFT Fillable Form (included in the handbook and shared drive under Assessment) for you to see the directions for each individual exercise. Please remember to bring a ruler to measure the trunk lift, make a strip of paper for students to use as a marker for their hands for the curl-ups, and a stopwatch to record the minutes and seconds for the mile. You do not need to document anything on the PFT Fillable Form. Please email it to your families, so they can see each exercise and can practice at home in advance. Your documentation will be on the PFT Collection Data Sheet. ToRs will document the information for each student on this sheet and email the document to the Director of Operations and Accountability and Special Programs.

The Director of Operations and Accountability will keep the ToRs informed regarding the testing window and due date for the PFT Collection Data Sheet.

*Recommendation - Try to buddy up with a few other ToRs to test your students together. The experience is even more enjoyable when you are working with others to create a low-key, positive environment for your students. For instance, in the past, groups of ToRs held the PFT at a nearby park on a designated weekday and everyone worked together to assess students. It's a great idea to go early and map out the one mile run.*

*When you are emailing your families about your specific testing date and location, please make sure to ask the families to be on time and have each student prepared with running shoes, a water bottle, a towel or an exercise mat (only if the student already has one), and comfortable, breathable athletic attire.*

### [i-Ready Benchmark Assessments – Computer Based Tests - \(K-11\)](#)

*i-Ready benchmark assessments are adaptive diagnostic tests that will indicate mastery and identify learning gaps in students K-11. This particular assessment will be given in the fall to provide ToRs and parents pertinent knowledge to assist with academic support and guidance, mid year to those who are in the WIN program and want to retake the assessments, and in the spring to determine growth and goals prior to state testing.*

- *Test Administration –*

*When we report our data, the data reflected is always in standard view. \*\*\*Although there are paper pencil assessments in lieu of i-Ready for students in grades K-11, PLEASE encourage ALL of your students to take the i-Ready assessments and utilize the personalized lessons (available for grades K-8). The i-Ready data that is collected is essential for telling our story to our stakeholders, on the LCAP, etc.*

*Benchmark Diagnostic #1 - FALL*

- *All students in grades K-11 are required to take the i-Ready benchmark assessments (ELA and math).*
- *ToRs will proctor students virtually!*
- *IF a student has specific accommodations outlined on the IEP/504 AND the SPED team/504 Coordinator deems it appropriate for the accommodations to be applied to the i-Ready assessments, the ToR MAY need to proctor the student in person.*
- *The results shared with the parents/students will be in standard view only!*
- *\*\*Please see the Intervention section for WIN and Shoreline student identification.*
- *ALL students need to be encouraged to complete the personalized i-Ready lessons that are provided upon completion of the ELA and math assessments.*

*Benchmark Diagnostic # 2 - WINTER*

- *ONLY WIN and Shoreline students will have the option of taking the winter benchmark assessment. Students who choose to test will have the opportunity to test out of WIN. Students who DO NOT choose to test, will remain in WIN and retest in the spring.*
- *This will give WIN and Shoreline students an opportunity to test out if they have made sufficient progress. See the Intervention section for details.*

- *ToRs will share the responsibility of offering test sessions for students who test in the winter. The results shared with the parents/students will be in standard view only!*

#### *Benchmark Diagnostic #3 - SPRING*

- *All students in grades K-11 are required to take the i-Ready benchmark assessments (ELA and math).*
- *ToRs will proctor students virtually!*
- *IF a student has specific accommodations outlined on the IEP/504 AND the SPED team/Intervention Coordinator deems it appropriate for the accommodations to be applied to the i-Ready assessments, the ToR MAY need to proctor the student in person.*
- *The results shared with the parents/students will be in standard view only!*
- *\*\*Please see the Intervention section for WIN and Shoreline student identification.*

#### *Important -*

- *Newly enrolled students will be required to take the i-Ready assessments immediately upon enrollment.*
- *ToRs will provide the student's score report/data to parents once students have completed both reading and math assessments.*
- *ToRs will encourage their students to consistently complete the individualized lessons.*

*\*\*\*Alternative paper pencil assessments are available for students in K-11 who opt out of taking the i-Ready assessments. PLEASE ENCOURAGE i-READY TESTING!*

## *Final Examinations of Online Courses*

*All students taking online courses with final exams that require proctors, will be given the exams in person. They will be administered by appropriate Excel Academy Staff in the fall and spring where applicable. Please reach out directly to the High School team for specific details.*



# Intervention

## Due Diligence

*As a Teacher of Record, it is your responsibility to ensure that students are supported and progressing adequately. It is critical that you consistently monitor your students' academic, social, and emotional needs.*

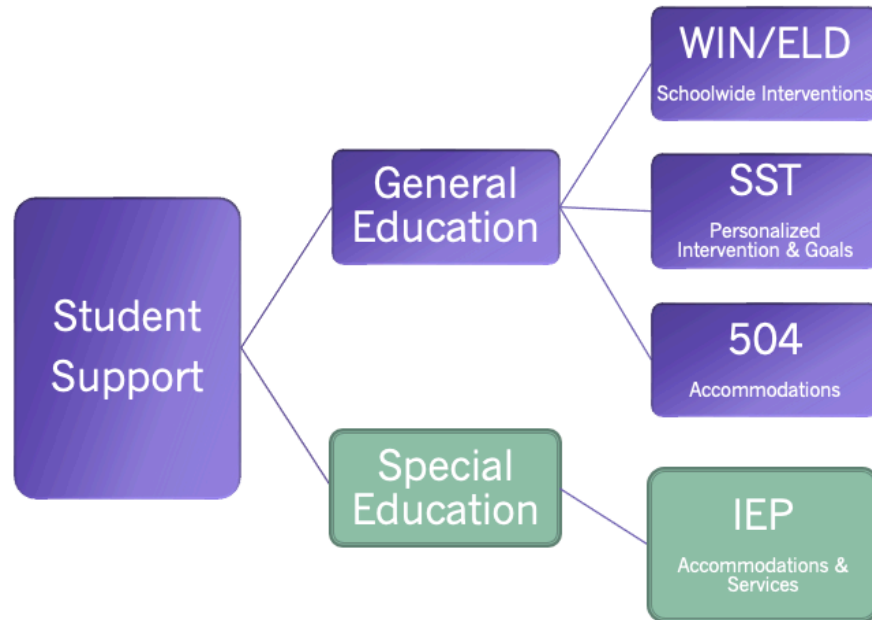
- *Be sure you support your students with WIN compliance.*
- *View lesson progress in the program 1x/month at minimum. Their lesson pathway may need to be adjusted to better meet their needs.*
- *Create a Student Support Log and choose interventions that may be helpful*
- *Share the log with your SST Contact if the interventions are not helping the student make progress.*
- *\*\*It is critical that you reach out for additional support and request SST (Student Success Team) meetings when necessary.*

## Who to Contact

<i>WIN List &amp; Interventions</i>	<i>Sarah Horikawa</i>	<i>WIN Classes</i>	<i>Tamara Murphy</i>
<i>WIN Compliance</i>	<i>Sarah Horikawa</i>	<i>ELD Classes</i>	<i>Tamara Murphy</i>
<i>SST Meetings TK-6</i>	<i>Tamara Murphy</i>	<i>Homeless/Foster Youth</i>	<i>Assigned Counselor</i>
<i>SST Meetings 7-12</i>	<i>Alison DeSchaine</i>		
<i>504 Meetings TK-6</i>	<i>April Saade</i>	<i>SPED Referrals</i>	<i>Noell Scott &amp; Tamara Murphy</i>
<i>504 Meetings 7-12</i>	<i>Assigned</i>	<i>Acceleration/Retention</i>	<i>Principal</i>

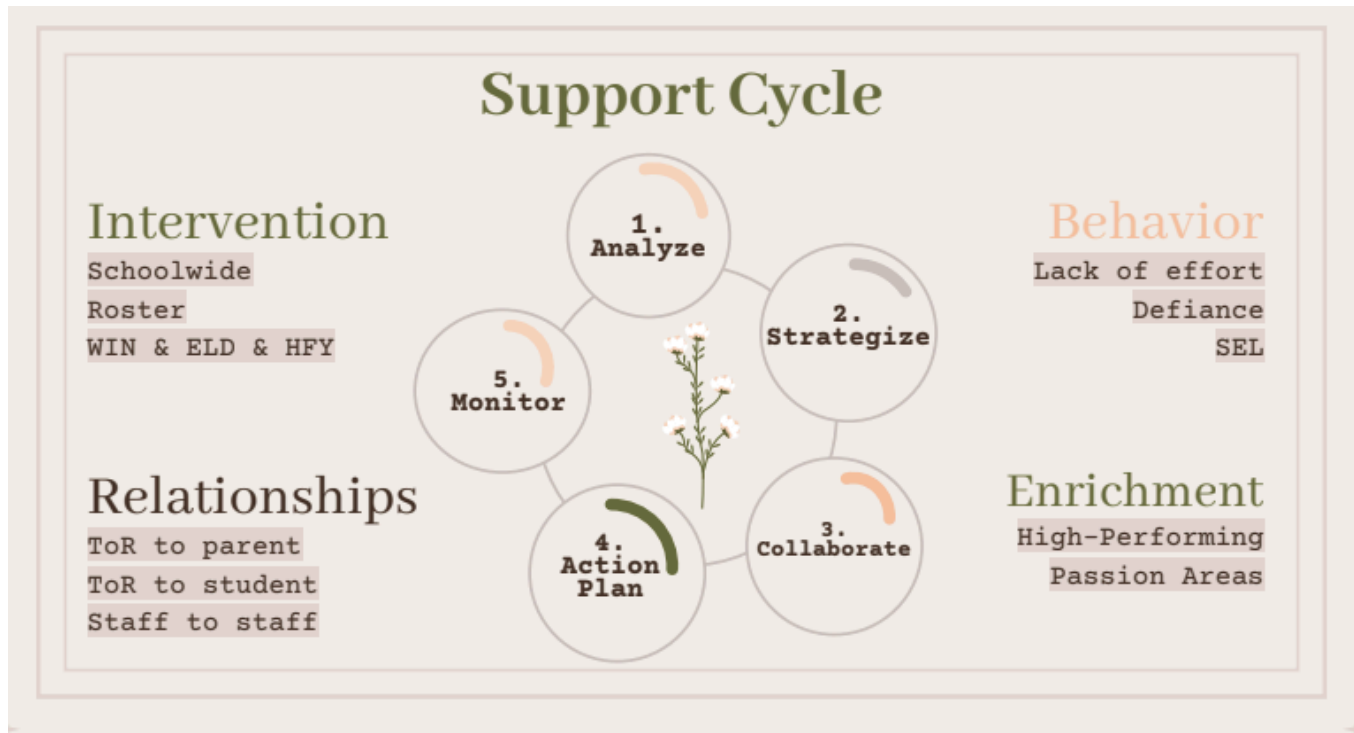
	Counselor		
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### Types of Student Support



### Support Cycle

*The Support Cycle may be used to address challenges in any area. Most often it is utilized with students, yet it may be helpful to implement with families and staff members, as well.*



## *WIN Intervention Program (What I Need)*

### Who:

*WIN program is required for students in 1st-8th grade*

*WIN students are identified by i-Ready diagnostic scores.*

*Students can test into and out of the WIN program with each test (Fall, Mid-Year, Spring).*

*Students required to participate in the WIN program are indicated below:*

- Overall score (standard view) is **RED**
- Overall score (standard view) is **YELLOW AND BELOW 50th percentile** (See National Norm)

### What:

- *The WIN Program is targeted, academic intervention and progress monitoring. Monthly plans are outlined in the [WIN Math Plan](#) and [WIN Reading Plan](#).*
- *A student's WIN program may also include recommended WIN Live class for small group instruction. Students are selected by the Intervention Team.*



### Why:

- As educators, it is our due diligence & our moral imperative to ensure that each student can access grade-level standards.
- The state of California requires every public school to have a Multi-Tiered System of Supports (MTSS) in place to help at-promise students reach state standards and make adequate academic progress. (<https://www.cde.ca.gov/ci/cr/ri/>)

### Important:

WIN intervention/assignments are required per the Acknowledgment of Responsibilities signed in the Master Agreement. Therefore, Parent, Student and ToR communication regarding the requirement is necessary. If a student does not complete their chosen intervention/assignments, they may receive a PIN (Progress Improvement Notification).

## *Student Success Team (SST)*

### *Process, Forms, & ToR Responsibilities*

TK-6 SST Meetings: Tamara Murphy, [tmurphy@excelacademy.education](mailto:tmurphy@excelacademy.education)  
7-12 SST Meetings: Alison DeSchaine, [adeschaine@excelacademy.education](mailto:adeschaine@excelacademy.education)

An SST (Student Success Team) is a problem solving group that meets to develop strategies and interventions to assist students with academic, attendance, behavioral, &/or social-emotional challenges. Please refer to the [Pre-SST Resources](#) & [SST Info & Directions](#) for more information.

## *English Learners*

### *Curriculum, Policies, & ToR Responsibilities*

TK-12 Designation & ELPAC Assessment - Jenny Craig, [jcraig@excelacademy.education](mailto:jcraig@excelacademy.education)  
TK-12 Curriculum, Instruction, & Support - Tamara Murphy, [tmurphy@excelacademy.education](mailto:tmurphy@excelacademy.education)

### Designation

Students are designated as English Learners based on their results from the Initial ELPAC assessment. ELs have the opportunity to redesignate if they earn an overall score of 4 on their Summative ELPAC assessment. This assessment is only offered once annually, in the spring. Please refer to the ASSESSMENT section above for further details. The SIS identification for ELs is a red asterisk. Select the asterisk to view current status details, select "tests" to see their ELPAC assessment scores.

### ELD Program Requirements

Excel Academy requires all students identified as English Learners to participate in our ELD (English Language Development) Program through both synchronous and asynchronous instruction. Please see the [ELD Handbook for ToRs](#) for more information.

### Translation & Interpretation Resources

Please refer to our [Translation & Interpretation Resources](#) for detailed information.

## 504 Accommodation Plans

### Process & ToR Responsibilities

EACS 504 Coordinator: April Saade, [assade@excelacademy.education](mailto:assade@excelacademy.education)

TK-6 504 Meetings: Elementary Counselor & Elementary Vice Principal

7-12 504 Meetings: School Counselors

Please view [504 Plans Explained](#) for an overview of 504 Plans. It is important to remember that 504 Plans are a function of general education, not special education. 504 Plan requests should be addressed in a timely manner to best support the student, parent, and ToR. Please notify the appropriate 504 contact (listed above) as soon as the possibility of a 504 Plan is discussed. Most often, new 504 Plans will first be addressed through an SST meeting to gather more information and to determine if a 504 Plan is the proper response to the concern.

## Special Education Assessment Requests

School Psychologist: Noell Scott, [nscott@excelacademy.education](mailto:nscott@excelacademy.education)

Intervention Coordinator: Tamara Murphy, [tmurphy@excelacademy.education](mailto:tmurphy@excelacademy.education)

If a parent requests a special education assessment, verbally or in writing, **please notify Noell Scott & cc Tamara Murphy immediately**. If you have concerns regarding your student's academic progress, please reach out to Tamara Murphy through the SST Process ([Pre-SST Resources](#) & [SST Info & Directions](#)).

## *Homeless, Foster, Mobile Youth (McKinney-Vento)*

*Homeless/Foster Liaison: Tamara Murphy*

*Elementary Family Support: Caroline Forester*

*Secondary Family Support (East): Larissa Allen-Jefferson*

*Secondary Family Support (CS): Daniel Favela*

### *Definition of Homelessness*

*The McKinney-Vento Act defines homeless children and youth as individuals who lack a fixed, regular, and adequate nighttime residence.*

### *McKinney-Vento Assistance Act*

- *The McKinney-Vento Homeless Assistance Act (McKinney-Vento Act) (42 U.S.C. § 11431-11435) is federal legislation that ensures the educational rights and protections of children and youth experiencing homelessness. It requires all local educational agencies (LEAs) to ensure that homeless students have access to the same free, appropriate public education, including public preschools, as provided to other children and youth.*

### *McKinney-Vento Identification*

- *Identified through enrollment registration packet SIS Label is a yellow asterisk*
- *ToR observation or notification from family- Email Tamara Murphy and assigned counselor, with status update including any available details ;*

### *Homeless & Foster Students*

*ToRs must notify the Homeless/Foster Liaison when a family makes you aware that they are residing outside of Kern, Los Angeles, San Bernardino, Riverside, Orange, or San Diego county.*

*Refer to our [Homeless, Foster & Mobile Youth Rights & Support Process](#) for detailed information.*

# Grade Retention & Acceleration

Elementary Principal: April Saade, [assade@excelacademy.education](mailto:assade@excelacademy.education)

Secondary Principal: Lorrie Wood, [lwood@excelacademy.education](mailto:lwood@excelacademy.education)

The general philosophy is that because Excel Academy offers personalized learning, retention & acceleration are rarely necessary. If a parent is requesting retention or acceleration, the ToR should reach out to their Principal. Please also review [Retention & Acceleration Policies & Processes](#).



## 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. ALL 3rd-8th grade students are invited to participate whether or not they have been identified as GATE.

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.



# Community

Shared Drive Community Folder

- [Excel Academy Permission Slips](#)
- [Waiver - When Parent B Takes Student A Forms](#)
- [Authorized Chaperone and Non-Student Sibling List](#)

Field Trips/Community Events

*In order to offer quality field trips each year, we depend on our teachers to help chaperone throughout the year. As part of your contract, Personalized Path ToRs are required to fulfill service requirements toward field trips and/or community events. Virtual Path ToRs are not required to complete these duties, but may participate if they choose to do so.*

*Each ToR may choose one of the following options (see table below) to fulfill their yearly requirements. Throughout the school year each ToR will document what they have completed in each column and change the pink cell to **green**. By the end of the school year, each column that is highlighted in pink should appear in green. Ex. If a ToR attended a field trip to Banducci's Farm, the ToR would record the event and the date under the field trip column and highlight the cell green: **Banducci's Farm 10/27/24**. The ToR would continue this process by signing up for categories that will fulfill their yearly requirement.*

*This year, we are requiring each Personalized Path ToR to attend the May Spring Celebration in their region. If you select an option that has Community Event requirements, the Spring Celebration cannot be used to fill one of these requirements.*

Option 1		
Community Event	Field Trips	Virtual Lessons

<i>Option 2</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Virtual Lessons</i>
<i>Option 3</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Specialty Event</i>
<i>Option 4</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Specialty Event</i>
<i>NHS Option</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Virtual Lessons</i>
<i>SSC Option</i>		
<i>Community Event</i>	<i>Field Trips</i>	<i>Virtual Lessons</i>
<i>Pali Option</i>		

Community Event	Field Trips	Virtual Lessons
	Pali	
Catalina Option		
Community Event	Field Trips	Virtual Lessons
	Catalina	

Per legal counsel, children of staff who are not enrolled Excel Academy students, may not attend field trips. If your child is an Excel Academy student and you are signed up to chaperone, your child must have a designated guardian attending with them. Waivers should reflect the information of the guardian in attendance and tickets, when applicable, must be purchased for this guardian.

Chaperone Checklist

*Outdoor Classroom Days*

- Reach out to the Community Liaison in charge of the park day with any questions.
- Wear your Excel Academy shirt/sweatshirt (and name tag if available).
- Bring your EACS Field Trip pack which will contain a flag, wristbands, and a first aid kit.
- Please take photos and send them to the Social Media Liaison (Michelle Moran).

*Field Trips*

- Wear your Excel Academy shirt/sweatshirt (and name tag if available).
- Bring your EACS Field Trip pack which will contain a flag, wristbands, and a first aid kit
- Double check your clipboard for extra copies of waivers. Copy included below and within the Community Folder of ToR Manual.
  - Waivers: student, parent, sibling
  - Waivers: parent B brings student A (highlighted in Red below)
- Arrive 15 minutes earlier than the time the coordinator of the event asks the families to arrive, so you can notify the venue to anticipate our group's arrival and greet the families when they arrive.
- Reserve 15 minutes for our families to gather before tours or activities start. Please use this time period to:
  - Take attendance and check in families
  - Collect waivers if any are missing



- *If it is a larger group, one ToR could help call/text families who are late and wait for them if necessary, while the other chaperone(s) stay with the rest of the group and move on to participate in the field trip activities.*
  - *The roster will note any special circumstances regarding transportation. If a student arrives with another family (that has not been noted or communicated to you previously by the coordinator), you must call the field trip coordinator.*
- *Stay with the group until the field trip is over. It is our hope that the presence of Excel Academy teachers at the field trips makes the trips more intimate and allows parents to feel the support of our team, and students feel they truly belong to an incredible school.*
- *Some parents do not want any pictures, front or back view, of their kids to be posted. Be sure to double check with parents that it is ok to take a photo. Make sure you get the names of the students for small group photos. Please send pictures to the Social Media Liaison and the field trip coordinator of the event to be posted on Instagram and Facebook, as well as the newsletter.*
- *Thank the families and venue when you leave to signal that Excel Academy's field trip time has ended, and the families are there on their own if they choose to stay. Text the community coordinator of the event when you leave.*
- *Turn in the collected waivers (one waiver for students, another for parents and non-students, including siblings and guests) to the office the next time you are there. There is no rush.*

### Reimbursement for Driving

*All teachers will receive mileage reimbursement at the IRS published reimbursement rate, this will cover driving expenses related to your job as a Teacher of Record. Teachers will keep track and submit reimbursement for their mileage for all work-related drives, including learning period meetings via Paycom mileage tracker application. Please see mileage reimbursement policy for additional details.*

*All reimbursements are to be submitted via Paycom and submitted within two weeks (10 business days) of the end of the month for which reimbursements are being requested.*



# Special Education Department

## Students with IEPs

Every student within the Special Education Department (SPED) has what is called an IEP, or Individualized Education Program. An IEP is a document and a map that lays out the program of special education instruction, supports and services a student requires in order to make progress toward grade level standards.

### *How do I know if I have a student receiving SPED services on my roster?*

In the ToR's student roster in SIS, a variety of symbols may appear next to a student's name. If a dark blue star appears, this will indicate that the student has an IEP. The ToR will reach out to the parent and explain how our school works, following the initial phone call guidelines, just like any other student assigned to them. The parent will sign the Master Agreement and Acknowledgement of Responsibilities, officially enrolling them in our school. If the parent of a newly enrolled SPED student poses questions to the ToR that they are unsure of the answer to, reach out to Lara Ulmer, Director of Special Education for further support.

**\*\*For newly enrolled High School students, it is vital to collaborate with the High School Counselors PRIOR to developing the student's MA. The counseling team will contact the SPED department if they require support in determining a student's course of study.**

**\*\*It is imperative that you inform the SPED Compliance Coordinator, Sarah Tomkiel, within 24 hours of the Master Agreement being signed. This 24 hour notification is crucial so that the Special Education team can comply with all legal timelines for newly enrolled students. IEP services cannot begin until a signed MA is received.**

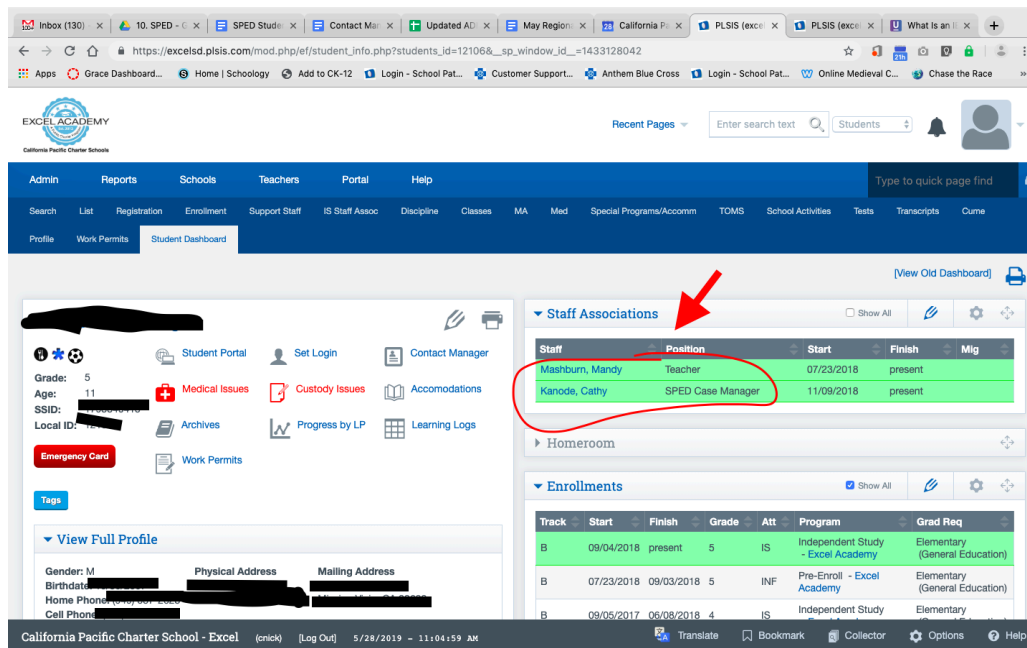
Once the MA is signed, an interim offer will be sent from the SPED Department to the parent/guardian and a 30 day IEP will be scheduled to finalize the student's IEP after a period of data gathering. **ToRs are required to participate in all portions of all IEP meetings for students on their roster, including the 30 day IEP. At the IEP all team members will be expected to speak to the students academic present levels at the time of the meeting.** ToRs

are the experts in general education expectations and grade level standards at all IEP meetings. This means you will need to spend extra time getting to know the educational needs/strengths of any new students with IEPs assigned to your roster.

Any questions about a continuing student's IEP should be directed to the assigned Case Manager. All students will be assigned to an Excel Academy Case Manager within 10 school days of the MA signature being received. For students enrolling with documentation of speech-only disabilities, their assigned CM will be a member of the speech team. You can find your student's Case Manager within SIS/Pathways.

### Find the Case Manager for Your Student:

- ❖ Click on the student name on your roster, which will take you to the student dashboard (see below).
- ❖ The circled names indicate the assigned teacher (yourself) and the case manager for the student.



Students with IEPs will be treated just like any other General Education student, except for any areas relating to their disability.

For instance, if a student with an IEP does not attend/reschedule an LP meeting, they should receive a PIN. Please note that ToRs are NOT required to request permission from the student's CM or any other special education team member prior to issuing a PIN according to the policies and guidelines set by Excel Academy.

Please include the student's assigned case manager once a student reaches their third PIN so that the team can guide you through required next steps and collaborate on strategies to best support the student. An IEP meeting is required specifically to discuss PIN concerns, per the EACS SPED PIN Policy.

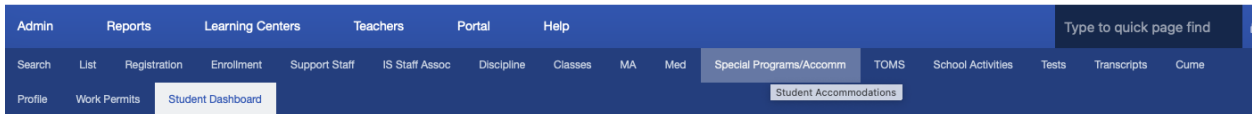
Following issuance of the 3rd PIN, please continue to issue PINs to all students if necessary, and continue to notify the CM as they accumulate.

\*If you are ever in doubt about a student's needs, please reach out to their assigned case manager for more information.

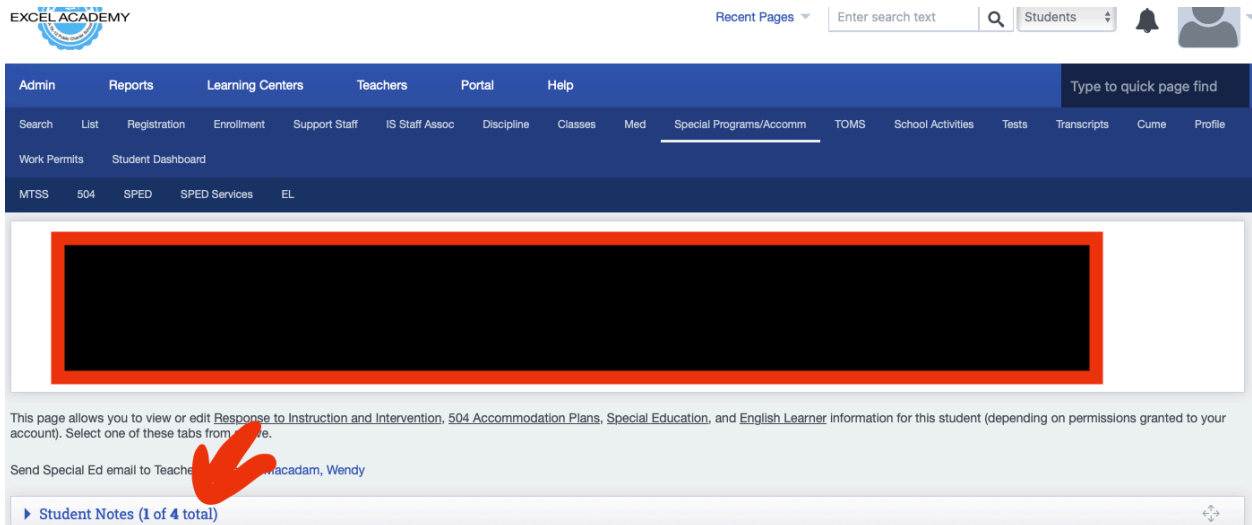
### Roles/responsibilities throughout the school year

Open communication with families during the year will assist in meaningful and fruitful IEP meetings. Prior to the first day of school, please look in SIS for the student's IEP at a Glance..

You can find it by clicking on the "Special Programs/Accomm" tab on the Student Dashboard.



From there, you will see "Student Notes". Click there and you will find the IEP at a Glance.



This document will provide you with a summary of the student's required disability accommodations, goals that are being addressed through the IEP, and the services currently being provided to address the goals. If you have any questions regarding the document or its contents, reach out to the CM.

Throughout the school year you will complete all your regularly assigned ToR duties for all students on your roster, including those with IEPs. However, for students with an IEP, you will have additional responsibilities.

For all students with IEPs on your roster:

- ❖ Read, review and be aware of changes to the student's IEP throughout the school year.
  - ❖ Become familiar with each student's goal areas, service areas, accommodations and modifications. Accommodations and modifications are required to be implemented throughout all general education activities.
  - ❖ The IEP is a legally-binding document that is active and in place every minute of every school day. Knowing and understanding it will support student progress and success!
  - ❖ Communication, communication, communication! Regular communication throughout the year is crucial to a meaningful IEP process.
  - ❖ Assist parents with the implementation of accommodations listed in the IEP (related to instruction and strategies.) Please consult with the assigned Case Manager as needed.
  - ❖ If you believe you require the assistance of the CM either in preparation for or during a LP meeting, please reach out to them well in advance. Once you have shared your concerns they will determine whether it is appropriate for them to accompany you to the LP meeting, or if a formal IEP meeting should be scheduled to address the concern with the entire team present. e.
  - ❖ Collaborate with students' assigned Case Manager prior to report card completion for support with appropriate comment selection.
  - ❖ Share all concerns related to special education with the student's assigned Case Manager immediately. The special education department is responsible for addressing many parent concerns in a formal manner via IEP discussion. If a parent is expressing concerns or directing requests regarding their student's special education services to you; it is your responsibility to direct the parent to their CM.
- \*\*If you reach out to a CM to share a concern or request on behalf of a parent, and do not receive a response within 48 hours, please reach out to the SPED Department Program Specialist for further assistance.***

For some students on your roster:

- ❖ In conjunction with the assigned Case Manager and IEP service providers, assist parents with implementation of modifications listed in the IEP
- ❖ Provide consultation or collaboration services as listed in the IEP

### Roles/responsibilities in preparation for the IEP meeting

The Special Education Case Manager is responsible for scheduling the IEP meetings and will communicate options for dates and times with all members of the IEP team. Regularly anticipated IEP meetings will be scheduled at least one month prior to the meeting.

*Note: Case managers will do their best not to schedule regular Plan Review and Eligibility Evaluations during LP meeting weeks. However, due to legal timelines or urgent circumstances, this cannot always be avoided.*

*General Education Feedback Form:* *This form will be located within the Shared Drive. In preparation for the IEP meeting you will need to complete it in its entirety.*

- ❖ *Please fill out every section of this form with current information that pertains to your student. You will need to add as much information as possible (1 or 2 sentences does not suffice) including most recent iReady and Statewide test scores if available.*
- ❖ *Please remember you are the link to the parent who is doing the primary teaching and using the curriculum and the IEP. If you do not have the information to complete a particular section of the form, please reach out to the Case Manager for guidance. Gathering parent-reported information may be appropriate for some areas, however as the ToR you are expected to have a full understanding of the student's academic levels.*
- ❖ *Always indicate if the information was gathered via assessment, observation, work samples, parent report etc.*

### *Role DURING the IEP meetings*

*As the ToR, you are the student's general education teacher of record and a legally required member of the IEP team. You are vital to the educational progress of students with IEPs and considered the general education expert for that student.*

*The general education teacher is expected to contribute to the IEP team process by obtaining and/or contributing to the team in the areas of:*

- *General Education curriculum and content.*
- *A student's performance and engagement within the Independent Study environment.*
- *A student's interactions with both their peers and parent/guardian.*
- *The pace at which a student's curriculum is being completed with mastery. Also, how much reteaching is needed to maintain that mastery.*
- *Relating general education assessment results, both formal and informal.*
- *A student's use of accommodations/modifications in their daily work.*

*The Case Managers will develop an agenda for each meeting so you know the sequence of topics, and when you will have the opportunity to speak. Throughout the meeting, the facilitator will ask if there are any questions and if certain team members are in agreement with the information being shared or recommendations being made. Please speak up and ask/answer questions throughout the meeting. The IEP requires input and consensus from all members of the team, and your voice is important! However, it is vital to remember that in all IEP meetings, the focus of all discussions and outcomes should be driven by student needs. IEPs are not developed or modified to meet the preferences of the parent or guardian.*

## **Roles/responsibilities AFTER the IEP meeting**

*After the IEP meeting you will receive the IEP via docusign for your signature on the attendance portion of the consent page.*

*Please sign to confirm your participation in the meeting within 24 business hours so that all IEPs can be affirmed for compliance within the allotted timelines. You will be notified once the parent has provided consent to the IEP. You will receive a full copy of the student's IEP. Please refer to this if you have any questions. If a parent signs in disagreement or partial agreement, the CM will let you know which parts of the IEP are to be implemented and which parts are in stay-put.*

- ❖ If the parent contacts you after the IEP to express concerns or pose questions prior to providing their signature of consent, please immediately notify their case manager.*
- ❖ The new IEP is in effect once consent is received and the IEP cycle will begin again. If any follow-up activities are required, you will be provided with this information.*





## Communication Protocol

### *Forms of Communication Used within Excel Academy:*

- ❖ *Beehively: This is the primary form of communication between both staff and families enrolled in Excel Academy. All important school wide announcements, opportunities, field trips, community events, registration sign ups, and other opportunities are posted on this platform, and will notify parents via email or text message. It is important that every Teacher's Beehively page is set up and used regularly by Teachers. ToRs who do not use this platform do a disservice to their families, as parents often follow the lead of their Teachers, and may miss out on important announcements and opportunities by ignoring communications sent by the school via Beehively to families.*
- ❖ *Email: Email is the primary mode of communication between staff members, and for one on one communications between a Teacher and a Parent/Student. It is important that if a question can be answered in an email, the sender uses this option. There are two reasons for this:*
  - *Emails are a perfect way to document a conversation took place and to relocate the information if needed in the future*
  - *Everyone is extremely busy and cannot take the time to answer the phone when an email is sufficient*
- ❖ *Phone: The phone should be used if the situation or question would be hard to easily describe in an email. (example: a situation with a family is so long and convoluted that it would require multiple emails back and forth.) It should also be used in the event of an emergency situation. Of course, if someone needs medical attention, dial 911 first, but then contact an administrator to apprise them of the situation.*
- ❖ *In-Person/Face-to-Face: This form of communication is rare and will only occur during our Professional Development and Regional Meetings as well as some performance reviews or other critical meetings.*

**\*\*Any correspondence with a student must include the parent/guardian. At no time should a ToR communicate solely with a student, unless you receive written permission from the parent/guardian.**

*Please Note: If sensitive information comes up in an email thread or you decide to call the individual(s) instead of continuing the thread, establish that a new form of communication will be taking place by writing something to the effect of: "I will give you a call to finish this discussion." That way, if you need to look back on the topic, you know that the conversation didn't fall through the cracks.*

*Please Follow the Guidelines Below:*

### Sender

- ❖ Only include those who need to know or respond to the communication. Think through before sending. Refer to each department's Who Does What sheet if you are unsure of who to email.
- ❖ Always "BCC" emails with large groups of people.
  - "bcc" allows receivers to "reply" back to the sender without including anyone else in the reply. This cuts down on unnecessary replies of "thank you" to everyone.
  - "bcc" allows for the privacy of other receivers of the email. Always use "bcc" when parent email addresses are involved. This will not allow anyone to see the email addresses.
  - "cc" is used when you do not need to hide the privacy of someone that is needed on the email.
    - Ex. Email to Lorrie that you would like to also be seen by Salmeh in admissions, but the primary email is to Lorrie.
- ❖ Title: The title should reflect what you are communicating in the email. Start a new email, rather than bring up a topic not related to the email string. **Do not attach an important conversation to the bottom of an email chain that has nothing to do with the topic. Do not start a new email chain about a topic already being discussed.**
  - Ex: A chain about a student not completing iReady:
    - **Incorrect:** "iReady"
    - **Correct:** "J. Smith Did Not Complete iReady"
    - **Incorrect:** "Idea"
    - **Correct:** "Idea for End of the Year Luncheon"
  - Ex: The email chain above turns into a conversation about concern over J. Smith's grades

- *Correct: Start a new email with the title "Question about Student Grades" with the appropriate people attached*
- *Incorrect: Continue the conversation with people that do not need to be on it in a chain that has a title that does not fit the topic*
  
- ❖ *Follow-up protocol: If you do not receive a response within 48 business hours, you may send a follow-up email.*
  
- ❖ *Urgent Emails: Emails that must be handled immediately due to time sensitivity. After 4 hours, you may follow up the email with another email and phone call.*
  - *If your request is Urgent, the title should include the word Urgent at the beginning, with the meaningful title following.*
    - *Ex. Urgent: Concerning Student Conduct*
  - *Urgent Emails should be answered within 4 hours during office hours (8:30-4:30)*

*\*\*What emails should be considered urgent?*

*SPED Testing Request, time sensitive SPED situations, Reports of Self-Harm, Emotional Distress, Abuse, Emergencies, etc.*

*\*\*What emails should NOT be considered urgent?*

*Work permits, concurrent enrollment forms, enrollment or withdrawal of a student, general IEP questions, attendance questions (unless you are Cori or Keri), etc. All aforementioned items have a process in place to review such requests.*

Receiver

- ❖ *If a sender accidentally sends an all staff email via CC rather than BCC, do NOT "reply all" to it. This adds unnecessary emails to everyone on the email.*
- ❖ *Reply to all emails within 24-48 hours and all urgent emails within 4 hours*

Things to Avoid:

- ❖ *Do not use ALL CAPS, as it can be construed as anger or yelling.*
- ❖ *Always read through and soften up anything that could be taken in the wrong way.*

## *Staff Resources*

<a href="#"><u><i>ToR Cheat Sheet</i></u></a>
<a href="#"><u><i>Policy Organizer</i></u></a>
<a href="#"><u><i>Comprehensive Safety Plan</i></u></a>
<a href="#"><u><i>Frequently Used Excel Websites for Families</i></u></a>
<a href="#"><u><i>Staff Directory</i></u></a>
<a href="#"><u><i>IT Request Form</i></u></a>

# 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
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		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					

October						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
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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
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10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February						
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						1
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23	24	25	26	27	28	

March						
Su	M	Tu	W	Th	F	Sa
						1
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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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		1	2	3	4	5
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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					

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

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

<span style="background-color: blue; color: white; padding: 2px;"> </span> Graduation
<span style="background-color: yellow; color: black; padding: 2px;"> </span> school holidays
<span style="background-color: green; color: black; padding: 2px;"> </span> end of semester

# Coversheet

## Consent Items - Policy Development

**Section:** VII. Consent  
**Item:** D. Consent Items - Policy Development  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** EACS BUS Consent - Board Policies - June.pdf

**EXCEL ACADEMY CHARTER SCHOOLS**

**Agenda Item:**

**Date:** June 13, 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 2024-2025 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***

3115 - EA General Terms and Conditions of the Purchase Order

- Clarified language throughout

***4000 Series - Personnel Services***

4145 - EA Professional Development Reimbursement Policy

- Removed *Preliminary and Clear Administrative Credential Reimbursement - Maximum of \$20,000* section
- Updated *Administrative Credential or Teaching Certification Reimbursement Process* section to remove specific costs.
- Removed all references to installments
- Removed the Step 3 allowance of full-time work less than 100% of a fiscal year to be combined with another partial year of full-time experience to qualify for reimbursement



**5000 Series - Student Services****5010 - EA Educational Records and Student Information Policy**

- Added January 1, 2017 update that the School shall not collect or solicit social security numbers from students or parents unless required by law
- Added that the School will not create a registry based on race, sexual orientation, religion, ethnicity, or national origin
- Removed broad statement regarding a list of circumstances or conditions under which the School might release student information to outside entities
- Added section to Disclosure of Education Records and Directory Information stating that the School will not provide the parent/guardian with a notification of any court orders, warrants or subpoenas for student records if it is an investigation of child abuse, neglect, or child dependency.
- Updated references of mailing records to emailing digital records
- Removed an incorrect statement regarding the Charter School notifying parents when a student's records are requested from another school, as it does not align with ed code

**5015 - EA Title IX, Harassment, Intimidation, Discrimination, and Bullying Policy**

- Altered all instances of "sexual harassment" to "sexual based harassment."
- Added non-discrimination clause and process for inquiries and complaints.
- Added sexual orientation, gender identity, and pregnancy related situations to the list of sexual based harassment conduct.
- Included list and process of those who have a right to make a complaint of sexual discrimination and request an investigation.
- Added Title IX Grievance Procedure section
- Replaced contact for reporting of misconduct
- Added paragraph on coordinating supportive measures for complainants and/or respondents to preserve/restore that person's access to EACS' educational program.
- Updated Notice of Allegations section
- Updated the Investigation process to include equal opportunity and impartial investigation verbiage.
- Added Questioning the Parties and Witnesses section
- Updated the Determination of Responsibility
- Included section on Disciplinary Sanctions and Remedies to note that EACS may impose disciplinary sanctions which may lead to termination, and reassignment of duties.

**5035 - EA Student Freedom of Speech and Expression Policy**

- Added Board of Directors to the beginning of the policy
- Move the *Student Expression* section down below the *Definitions* section
- Specified disability types
- Broadened the definition of sex, nationality, race and ethnicity, and religion
- Added "genetic information" to list of discriminatory material
- Added more electronic platforms to list of items where students have free speech rights
- Added paragraph on unprotected expression
- Updated specific language describing printed materials to just "materials"
- Removed specific time period to when the Executive Director shall notify students if distribution is granted or denied
- Included that distribution or solicitation of signatures may not occur during instructional time
- Added *Use of Virtual Bulletin Boards* section
- Removed organized demonstration time frames

- Added reference to the Attendance Policy and Suspension and Expulsion Policy
- Added new *Student Speeches* section
- Added “Appeals” to *Complaints and Appeals* section
- Added appeal process

5050 - EA Academic Integrity Policy

- Generalized the plagiarism checker process
- Added utilizing AI to generate student assignments to the examples of academic dishonesty
- Updated the Third Incident process and moved the student receiving an F in the course to the last point of action instead of the first
- Changed the point of contact for parents/students who disagree with a plagiarism accusation from the Executive Director to the Principal or designee
- Updated the point of contact for the teacher of 504 students who are suspected of plagiarism

5070 - EA Transgender and Gender Nonconforming Student Nondiscrimination Policy

- Fixed wording for clarity
- Removed unnecessary digressions for clarity
- Included “physical” to the list of ways gender transition can occur
- Removed unnecessary sentence about the growing number of transitioning students
- Removed paragraph regarding a media spokesperson
- Removed sentence regarding state testing as a reason for confidentiality being compromised
- Removed section on Locker Room Accessibility as it does not pertain to EACS’ model

5075 - EA Transcripts from Non-Accredited Schools Policy

- Added section on Policy for Accepting Credits from International Students
- Removed sentence on accepting a maximum of 40 credits/eight semester courses per semester for accepting credits from non-accredited schools
- Included “junior high” to all instances that reference that refer to students taking high school courses

5095 - EA Retention & Acceleration Policy

- Moved the list of the retention team into the first paragraph
- Changed all references from Assistant Director of Intervention to Principal
- Added last line to retention requests and acceleration requests regarding paperwork being completed and signed

**6000 Series - Instruction**

6010 - EA Independent Study Policy

- Adjusted diploma-bound course requirements for students
- Added Certificate of Completion line

6115 - EA Attendance Policy

- Added Ed Code regarding school districts not receiving apportionments for independent study students 21 years of age or older or 19 years or older who have not been continuously enrolled in any grade levels since their 18th birthday

6210 - EA Graduation Policy

- Updated College & Career Readiness requirements
- Added Ed Code regarding school districts not receiving apportionments for independent study students 21 years of age or older or 19 years or older who have not been continuously enrolled in any grade levels since their 18th birthday
- Added an option for early gradation of students meeting College & Career Readiness requirements

**Final Clean Versions of Revised Policies:**

[3115](#)  
[4145](#)  
[5010](#)  
[5015](#)  
[5035](#)  
[5050](#)  
[5070](#)  
[5075](#)  
[5095](#)  
[6010](#)  
[6115](#)  
[6210](#)

**Redline Versions of Revised Policies:**

[3115](#)  
[4145](#)  
[5010](#)  
[5015](#)  
[5035](#)  
[5050](#)  
[5070](#)  
[5075](#)  
[5095](#)  
[6010](#)  
[6115](#)  
[6210](#)

**REVIEWED**

The following are current policies that have been reviewed but have not needed any changes.

[5020](#)- EA Suicide Prevention Policy  
[5030](#) - EA Immunization Policy  
[5045](#)- EA Acceptable Use Policy  
[5055](#) - EA Self-Administration of Medication Policy  
[5065](#)- EA Lottery Policy  
[5070](#) - EA Transgender and Gender Nonconforming Student Nondiscrimination Policy

[5085](#)- EA Communicable Contagious or Infectious Disease Prevention  
[5105](#)- EA Direct Instruction and Supplemental/Administrative Support Policy  
[5110](#)- EA Cell Phones & Other Electronic Signaling Devices Policy  
[5115](#)- EA Pregnant and Parenting Students Policy

# Coversheet

## Approval of the Revised Excel Academy 2024-2025 Board Meeting Calendar & Schedule

**Section:** VIII. Board Governance  
**Item:** A. Approval of the Revised Excel Academy 2024-2025 Board Meeting  
Calendar & Schedule  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 2024-25 EACS Board Meeting Calendar and Schedule Revised.pdf

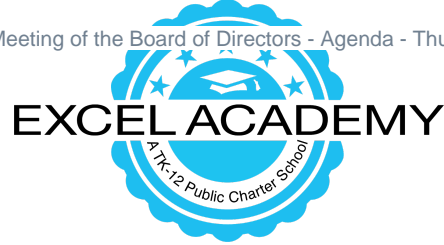
### BACKGROUND:

The 2024-2025 Board Calendar was revised to reflect the 2025-2026 Strategic Staffing Plan approval being moved from the March Board Meeting to the May Board Meeting.



## 2024-25 Board Meeting Calendar and Schedule

<i>Meeting Date</i>	<i>Topic</i>	<i>Presenter</i>
<p><b>August 8, 2024</b>  <b>Study Session</b>  <i>No Monthly Updates</i></p>	<p>Annual Board Evaluation                      Excel Academy Charter Schools Strategic Plan 2023-2026                      Annual Executive Director/CEO Board Goals                      Annual Executive Director/CEO Evaluation Planning</p> <hr/> <p><i>*Regular Board Meeting will be held, if needed.</i></p>	<p>Heidi Gasca</p>
<p><b>September 12, 2024</b>  <b>Regular Board Meeting</b></p> <p>Monthly Updates- August</p> <p>School Highlights Presentation (August)</p>	<p>Unaudited Actuals (2023-24) // Due September 15                      Budget/Fiscal Update                      Consolidated Application and Reporting System-  <i>No presentation</i>                      English Learner Master Plan                      Employee Handbook Revisions</p>	<p>Heidi Gasca                      Joe Sorrera</p>
<p><b>October 10, 2024</b>  <b>Regular Board Meeting</b></p> <p>Monthly Updates- September</p> <p>School Highlights Presentation (September)</p>	<p>General Education Update: Principal Report                      2023-24 Local Assessment Data Student Achievement Presentation                      Title 1 School-Parent Compact</p>	<p>Jenny Craig                      Keri Schneeweiss</p>
<p><b>November 14, 2024</b>  <b>Study Session</b></p> <p><i>No Monthly Updates</i></p>	<p>Board Manual Review                      Overview of Timeline- Ethics Training Online                      Performance Evaluations</p>	<p>Megan Anderson</p>
<p><b>December 12, 2024</b>  <b>Regular Board Meeting</b></p> <p>Monthly Updates-Oct/Nov</p>	<p>First Interim Budget // Due December 15                      Appoint Audit Committee                      Policies - Set 1                      Audit Report (Draft)                      Annual Organizational Meeting                      Multi-Tiered System of Supports (MTSS) (WIN (What I Need) Intervention)</p>	<p>Joe Sorrera                      Heidi Gasca</p> <p>Joe Sorrera                      Tamara Murphy</p>



## 2024-25 Board Meeting Calendar and Schedule

School Highlights Presentation	SPSA & Title 1 Updates	Jenny Craig
<b>January 9, 2025 Regular Board Meeting</b>  <i>No Monthly Updates</i>  School Highlights Presentation	2023-24 CAASPP State Assessment Data Student Achievement Presentation School Accountability Report Card (SARC)	Jenny Craig  Joe Sorrera
<b>February 13, 2025 Regular Board Meeting</b>	LCAP Mid-Year Report State Budget Overview and Update Special Education Presentation 2025-26 Board Meeting Calendar and Schedule (first read) 2025-26 Instructional Calendar	Lara Ulmer Jenny Craig and Joe Sorrera Heidi Gasca
<b>March 13, 2025 Regular Board Meeting</b>	Second Interim Budget // Due March 15 Policies - Set 2 Audit Firm Selection 2025-26 Board Meeting Calendar and Schedule (vote)	Heidi Gasca Joe Sorrera
<b>April 10, 2025 Study Session</b>	Annual Review Executive Director/CEO Evaluation & Contract	Heidi Gasca
<b>May 8, 2025 Regular Board Meeting</b>	Principals - Year in Review and Teacher Appreciation 2025-26 Employee Benefit Plans 2025-26 Strategic Staffing Plan Annual Executive Director/CEO Contract (Vote)	April Saade & Lorrie Wood Heidi Gasca Megan Anderson
<b>June 12, 2025 Regular Board Meeting</b>	LCAP Hearing & Local Indicators Presentation Estimated Actuals and July Budget Presentation Year End Recap, Highlights, and Goals Presentation Policies - Set 3 Parent/Student Handbook Property and Casualty Insurance	Jenny Craig Joe Sorrera
<b>June 18, 2025 (Wednesday) Regular Board Meeting</b>	LCAP & Local Indicators Estimated Actuals, Budget Overview for Parents, and July Budget (vote) Educator Protection Act (EPA) SELPA Master Contract	

*Pending Approval: February 8, 2024*



## 2024-25 Board Meeting Calendar and Schedule



# Coversheet

## Approval of Additional Chromebooks Purchase

**Section:** IX. Business/Financial Services  
**Item:** A. Approval of Additional Chromebooks Purchase  
**Purpose:** Vote  
**Submitted by:**

**Related Material:**

Excel Academy Charter School-(262)HP Chromebook 11 G9 11.6 Touch N5100 8GB RAM 64GB eMMC #93547.pdf

**BACKGROUND:**

Excel Academy uses HP Chromebooks for assessments, replacing those used by students and for new and virtual students. This strategic acquisition aims to enhance students' academic performance and language proficiency. The Chromebooks provide easy access to technology, helping to close learning gaps and accelerate student progress. Additional Chromebooks are being procured to meet all students' needs and ensure a smooth testing period. The Learning Recovery Emergency Block Grant, precisely Resource number 7435, will fund the purchase.

**RECOMMENDATION:**

It is recommended that the Board of Directors approve the purchase of the 262 HP Chromebooks from Arey Jones Educational Solution. This strategic investment, which will cost \$105,340.64, is crucial to enhancing students' academic performance and language proficiency. It is well within the budget allocated by the Learning Recovery Emergency Block Grant, making it a financially sound decision.



1055 6th Ave #101  
San Diego, California 92101

(800) 998-9199

HP Chromebook 11 G9 11.6" Touchscreen Intel Celeron N5100 8GB RAM 64GB  
eMMC 1 Year Warranty

Description	Qty	Unit Price	Ext. Price	Tax
6J173UT#ABA <b>HP Chromebook 11 G9 EE 11.6" Touchscreen Chromebook - HD - 1366 x 768 - Intel Celeron N5100 Quad-core (4 Core) 1.10 GHz - 8 GB Total RAM - 64 GB Flash Memory</b>	262	\$333.40	\$87,350.80	Y
CROS-SW-DIS-EDU <b>Google Chrome Education Upgrade</b>	262	\$30.00	\$7,860.00	Y
EWRFL14 <b>eWaste: more than 4 inches, less than 15 inches</b>	262	\$4.00	\$1,048.00	N
4TA21AA <b>Chromebook Google Enrollment Integration Services</b>	262	\$5.50	\$1,441.00	N
4TA23AA <b>Chromebook Asset Tag</b>	262	\$1.00	\$262.00	N

Price Subtotal: **\$97,961.80**



1055 6th Ave #101  
San Diego, California 92101

(800) 998-9199

## Excel Academy Charter School-(262)HP Chromebook 11 G9 11.6 Touch N5100 8GB RAM 64GB eMMC #93547

**Prepared by:**

**Arey Jones Educational Solutions**

Chris Chukwuocha  
800-998-9199  
chris.chukwuocha@areyjones.com

**Contract:**

HP NASPO 23011 – All States(sans GA) 12/1/2023-6/30/2025

HP NASPO 23011 – All States(sans GA) 12/1/2023-6/30/2025

**Prepared for:**

**Excel Academy Charter School**

,  
Nicole Tanner  
ntanner@excelacademy.education

**Quote Information:**

**Quote # 093547.1**

Quote Date: 05/15/2024  
Expiration Date: 06/14/2024  
Product Category:

### Quote Summary

Description	Amount
HP Chromebook 11 G9 11.6" Touchscreen Intel Celeron N5100 8GB RAM 64GB eMMC 1 Year Warranty	\$97,961.80

Non-taxable Subtotal:	<b>\$2,751.00</b>
Taxable Subtotal:	<b>\$95,210.80</b>
Grand Subtotal:	<b>\$97,961.80</b>
Estimated Tax:	<b>\$7,378.84</b>
Grand Total:	<b>\$105,340.64</b>

# Coversheet

## Approval of Instructional Funds Increase for Students for the 2024-25 School Year

**Section:** IX. Business/Financial Services  
**Item:** B. Approval of Instructional Funds Increase for Students for the 2024-25 School Year  
**Purpose:** Vote  
**Submitted by:**

### BACKGROUND:

On February 8, 2024, the Board of Directors took a crucial step by approving a measure to bolster instructional funding for every student by \$250, effective from the second semester of the 2023-24 school year. This decision was not made lightly but in response to the significant challenges faced by many families in recent years. Inflation rates, reaching a staggering 9.1%, have made it increasingly difficult to manage escalating expenses, including those associated with student services and instructional materials. This has directly impacted families and students affiliated with Excel Academy Charter School (EACS).

In light of these adversities, the administration at EACS deeply empathizes with families. We understand the financial strain they are under and maintain our unwavering commitment to cultivating an educational environment tailored to each student's unique needs. With this aim in mind, EACS proposes to increase each student's instructional funds by \$250 commencing from the first semester of the 2024/25 school year. If approved, the total cost would amount to \$417,750.

### RECOMMENDATION:

It is recommended that the Board of Directors approve the additional allotment of \$250 to each student's instructional funds for Excel Academy Charter Schools as presented. This increase will alleviate the financial burden on families and enhance the quality of education we provide, ensuring that each student's unique needs are met.

# Coversheet

## Approval of CharterLIFE Benefits (Renewal)

**Section:** X. Personnel Services  
**Item:** A. Approval of CharterLIFE Benefits (Renewal)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 2024-2025 Benefits Presentation.pdf  
CharterLIFE 2024 Renewal Package (SCA)\_v.2 FINAL\_2089\_v2 (3).pdf



# EACS GROUP BENEFITS

Medical, Dental, and Vision  
2024-2025



# MEDICAL ● ● ●

*Extending renewal of all current plans*

## KAISER

HMO (Low and High)  
+  
(2) HDP/HSA Plans

## ANTHEM BLUE CROSS

EPO (low and high)  
PPO (low and high)



# KAISER



## 10-28% Premium Increase

*\*\*\* Kaiser market rates increased for all participants - influx in cost, inflation and increased claims*

### HOW WE CAN HELP

Excel Academy Charter School will offer (2) HMO HDP to offset premium increase for applicable users. These include HSA eligibility.



# ANTHEM BLUE CROSS



## 15% Increase

*\*\*\*Standard market - inflation increase*

### HOW WE CAN HELP

Excel Academy Charter School will continue to offer plans to offset premium increase for applicable users.

PPO - Base

EPO - Base

# DENTAL & VISION



## DELTA DENTAL

- ❖ Extending renewal on current plans
  - ❖ 4% increase

## VSP VISION

- ❖ Extending renewal on current plan
  - ❖ 4% increase

# Other ancillary offerings include:

## SUPPLEMENTAL

- ❖ Accident
- ❖ Cancer

## FLEXIBLE SPENDING ACCOUNTS

- ❖ Dependent Care
- ❖ Healthcare



## LIFE INSURANCE

- ❖ FREE Employer sponsored \$50k
- ❖ NEW Buy up to 2x annual compensation (Employee sponsored)

# BENEFITS - RETIREMENT



## CERTIFICATED

CALSTRS standard employer  
contribution 19.1%

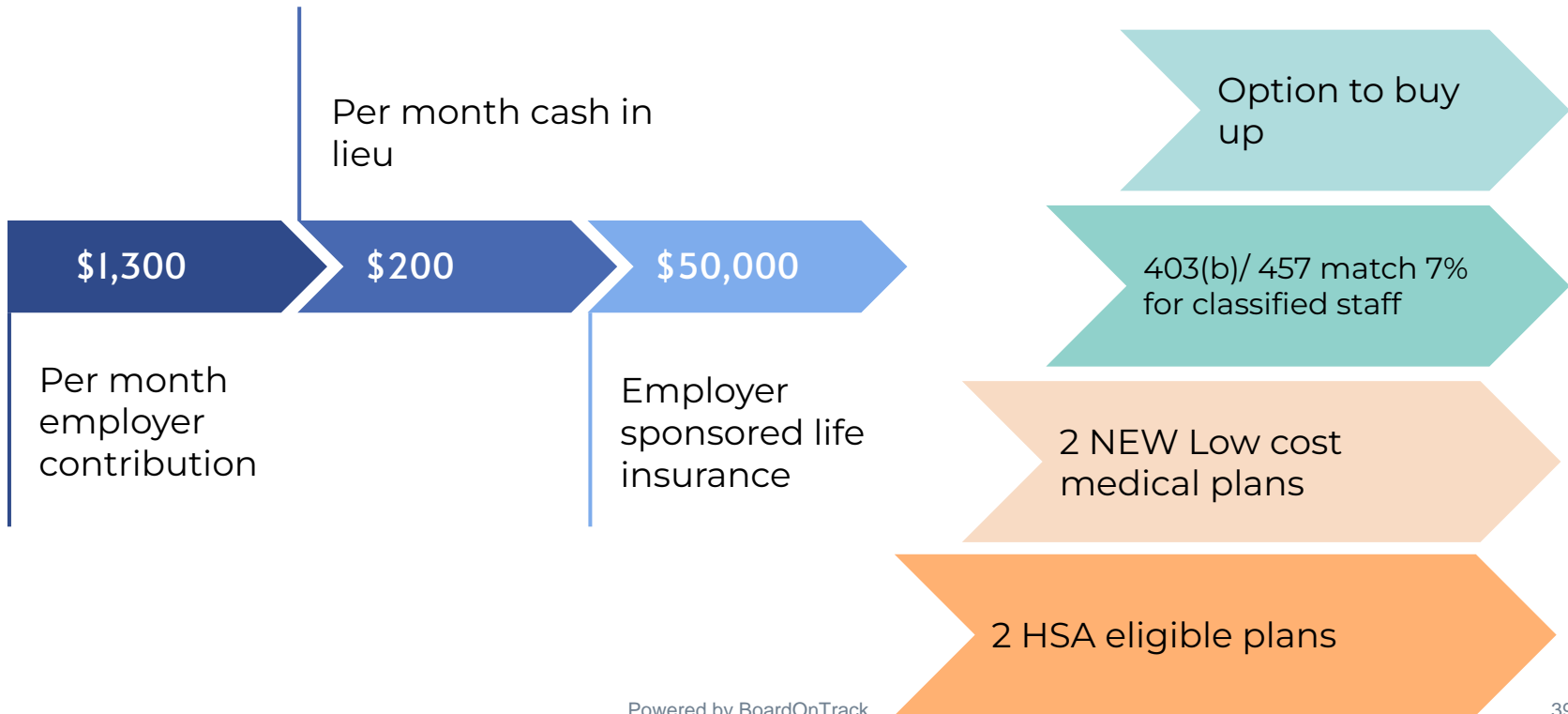


## CLASSIFIED

Employer match 7%



# WE AIM TO SUPPORT!



# What next?

- Human Resources will go to market for 2025-2026
- We will get new census submitted and understand standings with carriers as a large group
- We continue to offer 100% free coverage for employees only for all plans
- We continue to offer (2) free coverage plans for staff and children
- We continue to offer familiar plans that extend coverage to staff with preferred practitioners and specificalist
- 0 claim denial



**THANK YOU!**



# 2024 Renewal & Open Enrollment





***Index***

1. Welcome Letter .....pdf pg. 3-5

2. School Renewal Summary 2024.....pdf pg. 6-7

3. Contacts.....pdf pg. 8-10

4. OE Questionnaire & Checklist (Complete & Return) .....pdf pg. 11-13

5. Trust Documents (Complete & Return).....pdf pg. 14-20

6. Rate Sheet and Benefit Comparison .....pdf pg.21-25

7. Carrier Plan Summaries .....pdf pg.26-119

8. Voluntary Benefits .....pdf pg.120-158



Dear Charter School Leader:

Hello! We hope this message finds you well and that you're having a successful school year. We appreciate your patience during this year's renewal process. The process has been challenging, as we have expressed in recent communications, but we feel very good about the work that was done in order to furnish our members with a favorable renewal. Enclosed, please find the complete details of the benefits/programs for the 2024 renewal.

This year has been exceptionally difficult with the massive number of claims, carrier guideline changes, and health insurance increases industry wide. Kaiser Permanente, throughout California, leveled nearly a 20-25% renewal increase to all their current public sector members – CharterLIFE included. These reasons and extensive carrier negotiations have presented some timeline challenges again this year and we appreciate your patience. It was quite a heavy-lift to bring the renewal to a palatable increase and remain within our "standard" trend. Despite the many obstacles, we're pleased with the outcome and believe you will be as well.

Our efforts and the final results are a reminder of the dedicated work we do on behalf of you, and all our members! As we have stated time and time again, CharterLIFE negotiates FOR you – the members! CharterLIFE is NOT an insurance broker and does not earn commission, we work for the members and we are here as a trusted resource for your school board and staff.

CharterLIFE is aware of the very tight timelines in which you have to present these benefits out to your staff. We also understand that you and your staff may have questions and may need additional support during the open enrollment process. Please know, that we have dedicated additional staff and resources to ensure you and your school's needs are met and hopefully exceeded! Please make note of the important email addresses below; for a more efficient administrative experience email [TEAMS@CharterLIFE.org](mailto:TEAMS@CharterLIFE.org) and for staff inquiries email [HELP@CharterLIFE.org](mailto:HELP@CharterLIFE.org).

Please contact your Account Manager to discuss your renewal and rates, and the Open Enrollment timeline. We need to understand how we can best support you in communicating with your staff, schedule any benefit presentations, and to address any other questions or concerns you may have. Your open enrollment will be seamless and familiar as possible, especially with having no benefit changes this year. Your dedicated support team will provide you with open enrollment assistance, customized employee Benefit Information Guides (C-BIGS) and any carrier resources you may need.

Please take a moment to read the very important renewal information enclosed in this benefit package. If you have any questions or concerns; please contact your account manager, or a benefits specialist at our NEW EMAIL address [TEAMS@CharterLIFE.org](mailto:TEAMS@CharterLIFE.org) or call 1-866-755-6651 select (option 1).

Sincerely,

*The CharterLIFE Team*



As the Trust Administrator for CharterLIFE, we would like to take this opportunity to notify you that the 2024 health benefits renewal and Open Enrollment (OE) period is here!

**The Open Enrollment period will begin Tuesday, May 28, 2024 and continue through Friday, June 14, 2024 for coverage to be effective July 1, 2024 through June 30, 2025. If an extension to your Open Enrollment period is needed, please indicate this on your OE Questionnaire & Checklist.**

**Enclosed you will find your Benefit Package with the following important documents for your review and completion.**

- Index
- Welcome Letter
- Contacts
- OE Questionnaire & Checklist (**ACTION NEEDED**)
- Trust Documents: (**ACTION NEEDED**)
  - ✓ Participation Adoption Agreement
  - ✓ Addendum to Waiver
  - ✓ Attachment A

*(Complete and return ALL "ACTION NEEDED" items via email [Enrollment@CharterLIFE.org](mailto:Enrollment@CharterLIFE.org) or via fax at 916.467.1404.*

- Rate Sheets and Benefit Comparison
- Carrier Plan Summaries
  - ✓ Anthem Blue Cross
  - ✓ Kaiser
  - ✓ Delta
  - ✓ VSP
  - ✓ Unum

**We are very excited to announce some of the benefit changes below for the 2024 plan year!**

**Anthem Blue Cross: No Benefit Changes!** Please note other ACA mandates and company (carrier) changes, refer to summaries for complete list of changes.

**Optum (Pharmacy Benefit Manager): No Benefit Changes!**

**Kaiser Permanente: No Benefit Changes!** Please note other ACA mandates and company (carrier) changes, refer to summaries for complete list of changes.

**Delta Dental of CA: No Benefit Changes!** Please note other ACA mandates and company (carrier) changes, refer to summaries for complete list of changes.

**VSP: No Benefit Changes!** Please note other ACA mandates and company (carrier) changes, refer to summaries for complete list of changes.

**UNUM BASIC LIFE/AD&D/EAP & VOLUNTARY LIFE/AD&D: No Benefit Change!** Please note other ACA mandates and company (carrier) changes, refer to summaries for complete list of changes.



If you would like to schedule a My Health Benefits Online System Training, please let us know. We encourage you to schedule a training if you're a new staff member.

*\*For a complete benefits summary for each carrier, please refer to your open enrollment kit provided by your benefits specialist.*

**The Next Steps Are:**

- ✓ Complete and submit your questionnaire and Trust documents on or before the deadline.
- ✓ A benefits specialist will contact you to schedule your virtual OE meeting date and time.
- ✓ Accept 2024 Trust renewal. (**Must** receive all executed Trust Documents: Participation Adoption Agreement, Addendum to Waiver, and Attachment A)
- ✓ A benefits specialist will confirm your requested virtual OE date and time. (Optional, but recommended)
- ✓ Schedule My Health Benefits (formerly Vbas) Webinar Training (Optional)
- ✓ SUBMIT ENROLLMENT

We appreciate your patience and continued partnership and look forward to another successful year! If you have any questions, please do not hesitate to call us at **1-866-755-6651 (Select Option 1)** or email [CharterLIFE@brmsonline.com](mailto:CharterLIFE@brmsonline.com).

Sincerely,

Benefit & Risk Management Services On Behalf of CharterLIFE  
80 Iron Point Circle, Suite 200 | Folsom, CA 95630  
P 866.755.6651 | F 916.467.1404 | CharterLIFE@brmsonline.com



# 2024 Renewal Summary



Submit Renewal Acceptance/Enrollment To: **BRMS**

Secure Email: [CharterLIFE@brmsonline.com](mailto:CharterLIFE@brmsonline.com)

Phone: 866.755.6651 (option 2)

Fax: 916.467.1404

Customer ID: Vbas #2089

## 2024 Excel Academy Charter School Renewal Comparison

CharterLIFE™ Renewal Rates 2024 q3							SC									
Tier	BC EPO High	BC EPO Low	BC EPO Base	BC PPO High	BC PPO Low	BC PPO Base	Kaiser HMO High	Kaiser HMO Low	Kaiser HMO HDP \$1500	Kaiser HMO HRA \$3000	Dental PPO 2000	Dental PPO 1000	DeltaCare HMO	VSP VISION	Life 25,000	Life 50,000
Employee Only	\$798.81	\$730.03	\$676.30	\$1,319.19	\$1,213.92	\$944.42	\$917.74	\$842.91	\$787.15	\$570.42	\$58.69	\$51.18	\$14.81	\$9.47		
Employee+1											\$114.12	\$95.30	\$28.20	\$18.72	\$2.68	\$5.37
EE + Sp	\$1,757.39	\$1,606.08	\$1,487.86	\$2,902.24	\$2,670.66	\$2,077.70	\$2,019.03	\$1,854.41	\$1,731.73	\$1,254.92						
EE + Child/ren	\$1,437.86	\$1,314.06	\$1,217.37	\$2,374.56	\$2,185.08	\$1,699.95	\$1,651.93	\$1,517.23	\$1,416.86	\$1,026.74						
Family	\$2,475.89	\$2,263.11	\$2,096.55	\$4,089.52	\$3,763.20	\$2,927.69	\$2,845.00	\$2,613.02	\$2,440.16	\$1,768.29	\$188.50	\$156.62	\$45.51	\$30.66	-	117
Total EE's	-	27	2	14	5	1	6	18	2	-	18	36	20	64		

Tier	BC EPO High	BC EPO Low	BC EPO Base	BC PPO High	BC PPO Low	BC PPO Base	Kaiser HMO High	Kaiser HMO Low	Kaiser HMO HDP \$1500	Kaiser HMO HRA \$3000	Dental PPO 2000	Dental PPO 1000	DeltaCare HMO	VSP VISION	Life 25,000	Life 50,000
Employee Only		2	0	12	3	1	1	4	0		6	4	2	15		
Employee+1											6	7	6	17		
EE + Sp		0	1	0	1	0	0	2	0							117
EE + Child/ren		21	1	0	1	0	3	1	1							
Family		4	0	2	0	0	2	11	1		6	25	12	32		
Total EE's		27	2	14	5	1	6	18	2		18	36	20	64		117
Monthly	\$ 33,047.61	\$ 2,346.02	\$ 20,821.38	\$ 7,369.22	\$ 819.02	\$ 9,658.60	\$ 29,006.11	\$ 3,492.34			\$ 2,064.96	\$ 4,564.20	\$ 712.18	\$ 1,441.41		\$ 628.28
Monthly New	\$ 38,107.67	\$ 2,705.22	\$ 24,009.37	\$ 8,497.50	\$ 944.42	\$ 11,563.52	\$ 37,340.94	\$ 3,857.02			\$ 2,167.86	\$ 4,787.32	\$ 744.94	\$ 1,441.41	\$ -	\$ 628.28
Annual	\$ 396,571.32	\$ 28,152.24	\$ 249,856.56	\$ 88,430.64	\$ 9,828.24	\$ 115,903.20	\$ 348,073.32	\$ 41,908.08			\$ 24,779.52	\$ 54,770.40	\$ 8,546.16	\$ 17,296.92	\$ -	\$ 7,539.36
Annual New	\$ 457,292.00	\$ 32,462.67	\$ 288,112.46	\$ 101,970.04	\$ 11,332.98	\$ 138,762.27	\$ 448,091.30	\$ 46,284.18			\$ 26,014.32	\$ 57,447.84	\$ 8,939.28	\$ 17,296.92	\$ -	\$ 7,539.34
Change (+/-) %		15.31%	15.31%	15.31%	15.31%	15.31%	19.72%	28.73%	10.44%		4.98%	4.89%	4.60%	0.00%		0.00%

\*some figures may be rounded up/down and/or pending final approval for this presentation, please refer to your bill for

\*\* Cobra participants are not included in this representation of your renewal

\*Pending Final Action\*

Premium Summary	CURRENT	RENEWAL
Monthly Premium*	\$115,971.33	\$136,795.47
Annual Premium*	\$1,391,655.96	\$1,641,545.61
Monthly Increase*		\$20,824.14
Annual Increase*		\$249,889.65
Increase %		17.96%

## CharterLIFE™

Administered by: Benefit & Risk Management Services, Inc. PO BOX 2080, Folsom, CA 95630  
 Secure Email: [CharterLIFE@brmsonline.com](mailto:CharterLIFE@brmsonline.com) Phone: 866.755.6651 (option 2) Fax: 916.467.1404

CharterLIFE™ - In Partnership with Dickerson Employee Benefits License# OF69768



# Contact Form and Contacts Sheet



## CharterLIFE Contacts

CharterLIFE CONTACT INFORMATION			
Benefit	Contact	Phone	E-Mail Address
MyHealthBenefits Online	BRMS/TPA	866.755.6651 (option 1)	<a href="mailto:CharterLIFE@BRMSonline.com">CharterLIFE@BRMSonline.com</a>
Eligibility / COBRA / FSA	BRMS/TPA	866.755.6651 (option 1)	<a href="mailto:CharterLIFE@BRMSonline.com">CharterLIFE@BRMSonline.com</a>
Billing Questions	BRMS/TPA	866.755.6651 (option 2)	<a href="mailto:CharterLIFE@BRMSonline.com">CharterLIFE@BRMSonline.com</a>
Voluntary Benefits (Colonial)	BRMS/TPA	866.755.6651 (option 1)	<a href="mailto:CharterLIFE@BRMSonline.com">CharterLIFE@BRMSonline.com</a>
Account Manager/DEB	Dickerson	323.310.0834	<a href="mailto:teams@CharterLIFE.org">teams@CharterLIFE.org</a>
CharterLIFE Director	Damon Johnson	818.400.6171	<a href="mailto:Djohnson@CharterLIFE.org">Djohnson@CharterLIFE.org</a>
CharterLIFE CEO	Misti Cole	916.500.1122	<a href="mailto:MCole@CharterLIFE.org">MCole@CharterLIFE.org</a>
CharterLIFE Website	<a href="http://www.CharterLIFE.org">www.CharterLIFE.org</a>	888.392.3928	<a href="mailto:info@CharterLIFE.org">info@CharterLIFE.org</a>

CARRIER CONTACT INFORMATION			
Benefit:	Provider:	Phone:	Website:
Medical (EPO/PPO)	Anthem Blue Cross	800.227.3670	<a href="http://www.anthem.com/ca">www.anthem.com/ca</a>
Home Delivery Pharmacy	Optum Rx	844.568.2145	<a href="http://www.optumrx.com">www.optumrx.com</a>
Medical Kaiser HMO	Kaiser Permanente	800.464.4000	<a href="http://www.kaiserpermanente.org">www.kaiserpermanente.org</a>
Dental (HMO/PPO)	Delta Dental	800.422.4234 (HMO) 800.765.6003 (PPO)	<a href="http://www.deltadentalins.com">www.deltadentalins.com</a>
Vision	VSP Vision	800.877.7195	<a href="http://www.vsp.com">www.vsp.com</a>
Life/AD&D/Supplemental Life	UNUM	800-421-0344	<a href="http://www.unum.com">www.unum.com</a>
Voluntary Benefits	Colonial	866.755.6551 (opt.1)	<a href="http://www.Coloniallife.com">www.Coloniallife.com</a>
Retiree Medical Benefits	Dickerson	323.310.0834	<a href="mailto:teams@CharterLIFE.org">teams@CharterLIFE.org</a>





## School Contact Information Form

<b>Charter School Name:</b>	
<b>Charter School CDE #:</b>	
<b>Physical Address:</b>	
<b>Physical City:</b>	
<b>Physical State &amp; Zip Code:</b>	

Contract Signee's Contact Information:								
Date	Name	Title	Address	City	State	Zip Code	Phone #	Email Address

Primary Eligibility Contact Information:								
Date	Name	Title	Address	City	State	Zip Code	Phone #	Email Address

Additional Primary Eligibility Contact Information:								
Date	Name	Title	Address	City	State	Zip Code	Phone #	Email Address

Billing Contact Information:								
Date	Name	Title	Address	City	State	Zip Code	Phone #	Email Address

Additional Billing Contact Information:								
Date	Name	Title	Address	City	State	Zip Code	Phone #	Email Address

Outsource Billing Provider Contact Information: <i>(if none, please skip this section)</i>								
Outsource Billing Provider Name: (i.e. ExED, etc.)								
Date	Name	Title	Address	City	State	Zip Code	Phone #	Email Address

CharterLIFE Benefits Specialist: <i>(this section will be completed by the CharterLIFE benefits specialist)</i>	
<b>Company Name:</b>	
<b>Account Manager's Name:</b>	
<b>Address, City, State &amp; Zip:</b>	
<b>Contact Phone #:</b>	
<b>Email Address:</b>	



# OE Questionnaire & Checklist



## 2024 Open Enrollment Questionnaire & Checklist

Charter School Legal Name: \_\_\_\_\_  
(Print)

School Primary Eligibility Contact Name: \_\_\_\_\_  
(Print)

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

**Section 1: Open Enrollment Questionnaire**

**(Please complete the below questionnaire, completed required trust documents and send to [Enrollment@CharterLIFE.org](mailto:Enrollment@CharterLIFE.org) or fax to 916-467-1404 no later than May 28, 2024. Failure to meet the deadline may cause a delay to your charter school's open enrollment).**

**1. Benefit Fair Date Request (All Staff)**

(Please enter three (3) options from May 28, 2024 through June 14, 2024, for a Trust benefit specialist and/or carrier(s) to conduct your virtual benefit enrollment fair. An email will be sent to confirm your virtual benefit fair and open enrollment date).

**Virtual or onsite benefit fair can only be conducted after ALL Trust docs have been completed and submitted to BRMS.**

Virtual benefit fair with **online MHB\* EE self-service enrollment** can only be scheduled for a date 3 business days after the submission date of ALL Trust documents. Sorry, no exception.

Date:	Time:
Option 1: _____	_____
Option 2: _____	_____
Option 3: _____	_____

**If you do not wish to have a virtual benefit fair with benefit specialist and/or carrier(s), please check this box.**

*(Optional, but highly recommended. A benefits specialist will contact you to discuss the electronic enrollment process and coordination).*

**\*MyHealthBenefits (MHB) formerly known as Vbas**

**2. Answer the following questions regarding your contributions/benefit allowance for employees.**

**1. Do you contribute 100% for your employees' and their dependent(s) healthcare\* benefits that are offered through the CharterLIFE?**

**Yes** *(If answer is yes, skip to Section 2).*

**No** *(If the answer is no, please indicate the percentage of healthcare benefits contributed for employees and their dependents).*

Medical: Employee _____%	Dental: Employee _____%	Vision: Employee _____%
Dependent _____%	Dependent _____%	Dependent _____%
<input type="checkbox"/> N/A**	<input type="checkbox"/> N/A**	<input type="checkbox"/> N/A**



## 2024 Open Enrollment Questionnaire & Checklist

**2. Do you contribute an annual benefit allowance (e.g. dollar amount) for your employees' and/or their dependent(s) healthcare\* benefits that are offered through the CharterLIFE?**

**Yes** (If the answer is yes, please indicate the annual benefit allowance for each healthcare\* plan offered for employees and their dependents).

Medical: Employee \$ \_\_\_\_\_ Dental: Employee \$ \_\_\_\_\_ Vision: Employee \$ \_\_\_\_\_

Dependent \$ \_\_\_\_\_ Dependent \$ \_\_\_\_\_ Dependent \$ \_\_\_\_\_

N/A\*\*

N/A\*\*

N/A\*\*

*\*Healthcare benefits includes: medical, dental, and vision.*

*\*\*Complete the above contributions/benefit allowance for only benefits offered through CharterLIFE.*

*Note: We may contact you to obtain more information regarding your charter school's contributions/benefit allowance.*

**3. Are you interested in implementing a new BRMS administered Flexible Spending Account (FSA)?**

**Yes**

**No**

**Renew** (If FSA has already been implemented last year.)

**If Yes, check the type of FSA plan(s) to be implemented.**

**1. Medical Plan**  **Maximum Annual Amount** (up to \$3,200): \_\_\_\_\_

**2. Dependent Care Plan**  **Maximum Annual Amount** (up to \$5,000): \_\_\_\_\_

*BRMS representative will follow up with your charter school to begin the implementation process.*

**4. Are you interested in implementing Voluntary Products? Check all that applies.**

**Colonial Group Accident**

**Colonial Group Cancer**

**Colonial Group Critical Care**

**Colonial Group Medical Bridge**

**Unum Voluntary Employee, Spouse and Child Life**

**Unum Voluntary Employee, Spouse and Child AD&D**

*BRMS representative will follow up with your charter school to begin the implementation process for any new voluntary product selections.*

**5. Executed Required Trust Documents\*:**

▪ Participation Adoption Agreement (CharterLIFE\_PAA)

▪ Addendum to Waiver (CharterLIFE\_AA\_Addendum)

▪ Attachment A (CharterLIFE\_TRUST\_Attachment\_A)

*\*Must be signed by the charter school's contract signee and returned by **Wednesday, May 22, 2024** to renew with the trust. Failure to receive these required trust documents may cause a delay to your charter school's electronic open enrollment access and renewal.*



# Trust Documents (Complete & Return)



## PARTICIPATION ADOPTION AGREEMENT

This Adoption Agreement is made and entered into by and between \_\_\_\_\_ (“Participating Employer”) and CharterLIFE™ (“Trust Fund”).

The Participating Employer will contribute to the Trust Fund for: **(Check one)**

- All employees whose full time equivalency is equal to or greater than 50% (0.5 FTE), excluding employees who are covered by a collective bargaining agreement
- All employees whose full time equivalency is equal to or greater than 50% (0.5 FTE), including employees who are covered by a collective bargaining agreement
- If none of the above alternatives apply, please describe covered employment in the following classifications:

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The Participating Employer acknowledges that full-time is that amount of time (months, weeks, days or hours) spent regularly in a position and is considered to be full time by custom or industry standards and may vary from school to school.

The Participating Employer acknowledges that current employees will be enrolled effective the date of this Adoption Agreement and will have thirty (30) days from the effective date of this Adoption Agreement to submit a signed enrollment application(s).

The Participating Employer may elect to allow employees who are covered by the plan to waive coverage. If this election is exercised, the Participating Employer will not contribute to the Trust Fund for employees who waive coverage and will sign an Addendum to this Adoption Agreement. The Participating Employer: **(Check one)**

- Will allow employee coverage waivers
- Will not allow employee coverage waivers

The Participating Employer’s waiting period for employees’ coverage will be: **(Check one)**

- 1 Month
- 2 Months
- No Waiting Period
- If none of the above, enter waiting period: \_\_\_\_\_



## **PARTICIPATION ADOPTION AGREEMENT**

Employer acknowledges that a waiting period may be changed one time during any calendar year. Employer agrees to notify its employees of the selected waiting period.

The Participating Employer acknowledges that employees are enrolled effective the first of the month following the waiting period set forth above. If No Waiting Period is set forth above, employees' coverage will be effective the first of the month following the employee's date of hire.

The Participating Employer agrees to pay contributions at the rates established from time to time by the Trustees. All bills must be paid as billed and in full. Payment along with fully completed remittances forms are due by the 10th of the month following the month billed (the month of coverage) and subject to liquidated damages as stated in the Trust Agreement if received after the 20th of the month. The Participating Employer will contribute to the Trust Fund for each one of the benefit options selected on Attachment "A" to this Adoption Agreement.

The Participating Employer may not terminate its participation in the Trust Fund during the twelve (12) month period following the effective date of participation or following material change in terms of participation such as a new plan year. At the end of any insurance renewal date thereafter, the Participating Employer may terminate its participation in the Trust Fund by giving written notice of termination to the Trust Fund ninety (90) days in advance of the specific termination date.

The Participating Employer may not terminate a benefit option selected on Attachment "A" to this Adoption Agreement during the benefit option's insurance policy year. At the end of the benefit option's insurance policy year, the Participating Employer may terminate a benefit option by giving written notice to the Trust Fund and submitting a revised Attachment "A" ninety (90) days in advance of the end of the benefit option's insurance policy year.

The Trustees may terminate this Adoption Agreement at any time for the reasons set forth in Article VII, Section 2 of the Trust Agreement, or if continued participation by the Participating Employer would cause the Trust Fund and/or the employee welfare benefit plan(s) to lose tax exempt status. In order to continue participation, the Participating Employer must comply with the participation requirements as set-forth in the CharterLIFE JPA Agreement. Employer agrees to notify its employees of coverage termination whether done by the Trust or by the Employer.

The Participating Employer will fully defend, indemnify and save harmless the Trust Fund and its Trustees, employees, consultants and administrators against any and all loss, damage, liability, claim, demand or suit resulting from injury or harm to any person or property arising out of or in any way connected with the participation of the Participating Employer under this Adoption Agreement. This is intended to include, but is not limited to, claims for expenses incurred due to lack of health coverage due to Employer's failure to make timely premium payments, termination of coverage, employment-related claims, statutory violations, breach of contract claims and claims for damages resulting from personal injury or injury to property.



## PARTICIPATION ADOPTION AGREEMENT

The Participating Employer has received the Trust Agreement of the Trust Fund and agrees to be bound to the provisions contained therein, and any future amendments, which are incorporated into this Adoption Agreement by reference as though fully set forth.

Name of Participating Employer: \_\_\_\_\_

Adoption Agreement Effective Date: \_\_\_\_\_, 20\_\_\_\_

Revised Adoption Agreement Effective Date: \_\_\_\_\_, 20\_\_\_\_

### TRUST FUND

### PARTICIPATING EMPLOYER

\_\_\_\_\_  
Authorized Representative

\_\_\_\_\_  
Authorized Representative

Administrator  
Title

\_\_\_\_\_  
Title

Matthew Schafer  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

### Address of Trust

### Address of Participating Employer

80 Iron Point Circle, Suite 200

\_\_\_\_\_

Folsom, Ca 95630

\_\_\_\_\_

\_\_\_\_\_  
Employer Identification Number

\_\_\_\_\_  
CA Department of Education's CDS CODE





**ADDENDUM TO ADOPTION AGREEMENT OF EMPLOYER**  
**ALLOWING EMPLOYEES TO WAIVE COVERAGE**

This Addendum is made to the Adoption Agreement between \_\_\_\_\_  
\_\_\_\_\_ (“Participating Employer”) and the California Charter  
Schools Association Employee Welfare Benefit Trust, dba CharterLIFE™ (“Trust  
Fund”) signed by the Participating Employer on \_\_\_\_\_, 20\_\_.

The Participating Employer has elected not to contribute to the Trust Fund for employees who waive coverage. The Adoption Agreement requires the participating Employer to agree to the terms of this Addendum.

The Participating Employer will contribute to the Trust Fund for all employees except those who waive coverage in writing by signing the Trust Fund’s declination of coverage form. In the event that the Trust Fund reviews the payroll records of the Participating Employer, all declination of coverage forms must be presented to the Trust Fund auditor for review. Contribution payments must be made by the Participating Employer for all covered employees except those who have signed declination of coverage forms. It is the responsibility of the Participating Employer to maintain copies of these forms for no fewer than six (6) years after they are signed.

Except as required by the Patient Protection and Affordable Care Act, Employees may only decline coverage if they are: (1) covered as a dependent under another group health benefit plan through their spouses or domestic partners; or (2) are covered under a military health plan, Medicare or Medicaid. It is the responsibility of the Participating Employer to obtain written proof of alternate insurance coverage by employees declining coverage. The Participating Employer must also provide the Trust Fund auditor with copies of the proof of alternate insurance during any payroll record review.

It is the responsibility of the Participating Employer to immediately notify the Trust Fund of any change in status of employees who have declined coverage. The Trust Fund has no obligation to communicate with the Participating Employer’s employees about their alternate coverage or their declination of coverage. This is a responsibility of the Participating Employer.

The Participating Employer will fully defend, indemnify and save harmless the Trust Fund and its Trustees, employees and administrators against any and all loss, damage, liability, claim, demand or suit resulting from injury or harm to any person or property arising out of or in any way connected with the participation of the Participating Employer under this Addendum to the Adoption Agreement. This is intended to include, but is not limited to, employment-related claims, statutory violations, breach of contract claims, claims for health and welfare and/or medical benefits of any type, resulting from any medical condition, illness, personal injury or injury to property.



**ADDENDUM TO ADOPTION AGREEMENT OF EMPLOYER**  
**ALLOWING EMPLOYEES TO WAIVE COVERAGE**

The Participating Employer also agrees that any dispute arising under this Addendum, involving itself or any employee, will be subject to the Plan's claim and appeal process. Any Participating Employer, participant, dependent or beneficiary adversely affected by any action of the Trust Fund or its Trustees under this Addendum will be entitled, within sixty (60) days after being apprised of the Trustees' decision leading to such adverse action, request the Trustees in writing to conduct a review as per the claim and appeal process. The Trustees will allow the aggrieved party to submit any additional information and the Trustees can conduct a hearing thereafter if the Trustees in their sole discretion so elect. If a hearing is held the Employer, and any participating employee, dependent or beneficiary may present his position against the adverse action. If no hearing is held the Trustees will make their decision based on the written evidence and written argument presented. The Participating Employer, participating employee, beneficiary or dependent may be represented by an attorney or other individual designated at the election and in the sole discretion of the Trustees. The Trustees will issue a written decision within sixty (60) concerning their ruling following the hearing if one is granted. The decision of the Trustees, if adverse, may be challenged in Federal District Court for abuse of discretion.

The parties' signatory to this ADDENDUM to ADOPTION AGREEMENT is as follows:

**TRUST FUND**

**PARTICIPATING EMPLOYER**

By: \_\_\_\_\_  
Authorized Representative

By: \_\_\_\_\_  
Authorized Representative

By: Matthew Schafer  
Print name

By: \_\_\_\_\_  
Print name

Title: Administrator

Title: \_\_\_\_\_

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

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



**ADOPTION AGREEMENT ATTACHMENT "A"**

**Participating Employer's Selection of Benefit Options**

Participating Employer: \_\_\_\_\_

**Medical Benefits**

**Anthem Blue Cross**

- EPO High Option Effective Date: \_\_\_\_\_
- EPO Low Option Effective Date: \_\_\_\_\_
- EPO Base Option Effective Date: \_\_\_\_\_
- PPO High Option Effective Date: \_\_\_\_\_
- PPO Low Option Effective Date: \_\_\_\_\_
- PPO Base Option Effective Date: \_\_\_\_\_

**Kaiser Foundation Health Plans, Inc.**

- HMO High Option Effective Date: \_\_\_\_\_
- HMO Low Option Effective Date: \_\_\_\_\_
- HMO \$1500 High Deductible Effective Date: \_\_\_\_\_
- HMO \$3000 HRA Effective Date: \_\_\_\_\_

**Dental Benefits**

- DeltaCare HMO Effective Date: \_\_\_\_\_
- Delta Dental PPO 1000 Effective Date: \_\_\_\_\_
- Delta Dental PPO 2000 Effective Date: \_\_\_\_\_

**Vision Benefits**

- VSP Vision Effective Date: \_\_\_\_\_

**Life Insurance Benefits**

**Unum** – May offer one Group Life, AD&D and EAP plan (*select only one option*)

- \$25,000 Group Life, AD&D and EAP Effective Date: \_\_\_\_\_
- \$50,000 Group Life, AD&D and EAP Effective Date: \_\_\_\_\_
- 2X Salary Up to \$150k Group Life, AD&D and EAP Effective Date: \_\_\_\_\_

**Participating Employer:**

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

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

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_



# 2024 Rate Sheet



### Kaiser Rates

CharterLIFE™ Renewal Rates 2024				SCq3
Tier	Kaiser HMO High	Kaiser HMO Low	Kaiser HMO HDP \$1500	Kaiser HMO HRA \$3000
Employee Only	\$917.74	\$842.91	\$787.15	\$570.42
Employee+1				
EE + Sp	\$2,019.03	\$1,854.41	\$1,731.73	\$1,254.92
EE + Chld/ren	\$1,651.93	\$1,517.23	\$1,416.86	\$1,026.74
Family	\$2,845.00	\$2,613.02	\$2,440.16	\$1,768.29
Total EE's				

### Anthem Rates

CharterLIFE™ Renewal Rates 2024				SCq3	FINAL	
Tier	BC EPO High	BC EPO Low	BC EPO Base	BC PPO High	BC PPO Low	BC PPO Base
Employee Only	\$798.81	\$730.03	\$676.30	\$1,319.19	\$1,213.92	\$944.42
Employee+1						
EE + Sp	\$1,757.39	\$1,606.08	\$1,487.86	\$2,902.24	\$2,670.66	\$2,077.70
EE + Chld/ren	\$1,437.86	\$1,314.06	\$1,217.37	\$2,374.56	\$2,185.08	\$1,699.95
Family	\$2,475.89	\$2,263.11	\$2,096.55	\$4,089.52	\$3,763.20	\$2,927.69
Total EE's						

### Dental / Vision / Life

CharterLIFE™ Renewal Rates 2024				SCq3	FINAL	
Tier	Dental PPO 2000	Dental PPO 1000	DeltaCare HMO	VSP VISION	Life 25,000	Life 50,000
Employee Only	\$58.69	\$51.18	\$14.81	\$9.47	\$2.68	\$5.37
Employee+1	\$114.12	\$95.30	\$28.20	\$18.84		
EE + Sp					-	
EE + Chld/ren						
Family	\$188.50	\$156.62	\$45.51	\$30.66		
Total EE's						



# Carrier Plan Summaries



# Anthem Blue Cross High PPO




The Summary of Benefits and Coverage (SBC) document will help you choose a health [plan](#). The SBC shows you how you and the [plan](#) would share the cost for covered health care services. **NOTE: Information about the cost of this [plan](#) (called the [premium](#)) will be provided separately.**

**This is only a summary.** For more information about your coverage, or to get a copy of the complete terms of coverage, [www.brmsclaims.com](http://www.brmsclaims.com). For general definitions of common terms, such as [allowed amount](#), [balance billing](#), [coinsurance](#), [copayment](#), [deductible](#), [provider](#), or other underlined terms see the Glossary. You can view the Glossary at [www.brmsclaims.com](http://www.brmsclaims.com) or call 1-866-755-6651 to request a copy.

Important Questions	Answers	Why This Matters:
What is the overall <a href="#">deductible</a> ?	<b>In-Network: \$500</b> Individual / <b>\$1,000</b> Family <b>Out of Network: \$1,000</b> Individual / <b>\$2,000</b> Family	Generally, you must pay all the costs from <a href="#">providers</a> up to the <a href="#">deductible</a> amount before this plan begins to pay. If you have other family members on the <a href="#">plan</a> , each family member must meet their own individual <a href="#">deductible</a> until the total amount of <a href="#">deductible</a> expenses paid by all family members meets the overall family <a href="#">deductible</a> .
Are there services covered before you meet your <a href="#">deductible</a> ?	<b>Yes.</b> <a href="#">Preventive</a> care services, office visits, prescription drugs, and Telemedicine visits.	This <a href="#">plan</a> covers some items and services even if you haven't yet met the <a href="#">deductible</a> amount. But a <a href="#">copayment</a> or <a href="#">coinsurance</a> may apply. For example, this plan covers certain preventive services without cost-sharing and before you meet your deductible. See a list of covered preventive services at <a href="https://www.healthcare.gov/coverage/preventive-care-benefits/">https://www.healthcare.gov/coverage/preventive-care-benefits/</a> .
Are there other <a href="#">deductibles</a> for specific services?	<b>No.</b>	You don't have to meet <a href="#">deductibles</a> for specific services.
What is the <a href="#">out-of-pocket limit</a> for this <a href="#">plan</a> ?	<b>In-Network: \$1,500</b> Individual / <b>\$3,000</b> Family <b>Out of Network: \$3,000</b> Individual / <b>\$6,000</b> Family	The <a href="#">out-of-pocket limit</a> is the most you could pay in a year for covered services. If you have other family members in this <a href="#">plan</a> , they have to meet their own <a href="#">out-of-pocket limits</a> until the overall family <a href="#">out-of-pocket limit</a> has been met.
What is not included in the <a href="#">out-of-pocket limit</a> ?	<a href="#">Premiums</a> , balance-billed charges, penalties for failure to obtain pre-authorization, infertility treatment and health care this <a href="#">plan</a> doesn't cover.	Even though you pay these expenses, they don't count toward the <a href="#">out-of-pocket limit</a> .
Will you pay less if you use a <a href="#">network provider</a> ?	<b>Yes.</b> See <a href="http://www.anthem.com/ca">www.anthem.com/ca</a> or call Benefit & Risk Management Services at 1-866-755-6651 for a list of network providers.	This <a href="#">plan</a> uses a provider <a href="#">network</a> . You will pay less if you use a <a href="#">provider</a> in the plan's <a href="#">network</a> . You will pay the most if you use an <a href="#">out-of-network provider</a> , and you might receive a bill from a <a href="#">provider</a> for the difference between the provider's charge and what your <a href="#">plan</a> pays ( <a href="#">balance billing</a> ). Be aware, your <a href="#">network provider</a> might use an <a href="#">out-of-network provider</a> for some services (such as lab work). Check with your <a href="#">provider</a> before you get services.
Do you need a <a href="#">referral</a> to see a <a href="#">specialist</a> ?	<b>No.</b>	You can see the <a href="#">specialist</a> you choose without a <a href="#">referral</a> .



 All [copayment](#) and [coinsurance](#) costs shown in this chart are after your [deductible](#) has been met, if a [deductible](#) applies.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
If you visit a health care <a href="#">provider's</a> office or clinic	Primary care visit to treat an injury or illness	\$20 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	30% <a href="#">coinsurance</a>	None
	<a href="#">Specialist</a> visit	\$20 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply		
	<a href="#">Preventive care/screening/immunization</a>	No charge	30% <a href="#">coinsurance</a>	None
	Anthem Live Health Online	No <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	30% <a href="#">coinsurance</a>	Telemedicine services provided by a primary care physician or specialist will be covered the same as any other office visit with that provider.
If you have a test	<a href="#">Diagnostic test</a> (x-ray, blood work)	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	None
	Imaging (CT/PET scans, MRIs)	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	\$800 maximum / service for Non-Network Providers.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
<b>If you need drugs to treat your illness or condition</b> More information about <a href="http://www.optumrx.com">prescription drug coverage</a> is available at <a href="http://www.optumrx.com">www.optumrx.com</a>	Generic drugs	Tier1a: Retail: \$5 <a href="#">copay</a> / prescription Mail Order: \$12.50 <a href="#">copay</a> / prescription Tier1b: Retail: \$15 <a href="#">copay</a> / prescription Mail Order: \$37.50 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Preferred brand drugs	Retail: \$25 <a href="#">copay</a> / prescription Mail Order: \$75 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Non-preferred brand drugs	Retail: \$45 <a href="#">copay</a> / prescription Mail Order: \$135 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	<a href="#">Specialty drugs</a>	Retail & Mail Order: 30% coinsurance up to \$250 per prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply. Specialty drugs must be obtained through US Specialty Care Pharmacy (USSC) after one fill at a participating retail pharmacy.
<b>If you have outpatient surgery</b>	Facility fee (e.g., ambulatory surgery center)	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	\$350 maximum / service for Non-Network Providers
	Physician/surgeon fees	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	None
<b>If you need immediate medical attention</b>	<a href="#">Emergency room care</a>	\$150 / visit then 10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	Covered as In-Network	Copay waived if admitted. 10% coinsurance for Emergency Room Physician Fee.
	<a href="#">Emergency medical transportation</a>	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	Covered as In-Network	None

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	<a href="#">Urgent care</a>	\$20 <a href="#">copay</a> / office visit Deductible does not apply	30% <a href="#">coinsurance</a>	None
<b>If you have a hospital stay</b>	Facility fee (e.g., hospital room)	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	\$1,000 maximum / day for Non-Emergency Admissions to Non-Network Providers
	Physician/surgeon fees	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	None
<b>If you need mental health, behavioral health, or substance abuse services</b>	Outpatient services	\$20 <a href="#">copay</a> / office visit 10% <a href="#">coinsurance</a> after <a href="#">deductible</a> / outpatient	30% <a href="#">coinsurance</a>	None
	Inpatient services	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	\$1,000 maximum/day for Non-Emergency Admissions to Non-Network Providers. 10% coinsurance for Inpatient Physician Fee In-Network Providers. 30% coinsurance for Inpatient Physician Fee Non-Network Providers.
<b>If you are pregnant</b>	Office visits	\$20 <a href="#">copay</a> / initial visit <a href="#">deductible</a> does not apply	30% <a href="#">coinsurance</a>	\$1,000 maximum/day for Non-Emergency Admissions to Non-Network Providers. Maternity care may include tests and services described elsewhere in the SBC (i.e. ultrasound). *Coverage includes fertility preservation services, see Fertility Preservation section.
	Childbirth/delivery professional services	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	
	Childbirth/delivery facility services	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	
<b>If you need help recovering or have other special health needs</b>	<a href="#">Home health care</a>	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	100 visits/benefit period one visit by a home health aide equals four hours or less.
	<a href="#">Rehabilitation services</a>	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	*See Therapy Services section.
	<a href="#">Habilitation services</a>	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	*See Therapy Services section.
	<a href="#">Skilled nursing care</a>	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	Must commence within 14 days of an inpatient hospital stay that is at least 3 days. Limited to 100 days per calendar year.
	<a href="#">Durable medical equipment</a>	10% <a href="#">coinsurance</a> after <a href="#">deductible</a>	30% <a href="#">coinsurance</a>	None

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	<a href="#">Hospice services</a>	No <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	30% <a href="#">coinsurance</a>	None
If your child needs dental or eye care	Children's eye exam	Not Covered	Not Covered	Refer to Vision Plan
	Children's glasses	Not Covered	Not Covered	Refer to Vision Plan
	Children's dental check-up	Not Covered	Not Covered	Refer to Dental Plan

### Excluded Services & Other Covered Services:

#### Services Your [Plan](#) Generally Does NOT Cover (Check your policy or [plan](#) document for more information and a list of any other [excluded services](#).)

- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>• Cosmetic surgery</li> <li>• Dental check-up</li> <li>• Dental care (Adult)</li> <li>• Eye exams for a child</li> </ul> | <ul style="list-style-type: none"> <li>• Infertility treatment</li> <li>• Long term care</li> <li>• Glasses for a child</li> <li>• Dental care (Pediatric)</li> </ul> | <ul style="list-style-type: none"> <li>• Routine eye care (Adult)</li> <li>• Routine foot care unless you have been diagnosed with diabetes</li> <li>• Weight loss programs</li> </ul> |
|---|---|--|

#### Other Covered Services (Limitations may apply to these services. This isn't a complete list. Please see your [plan](#) document.)

- |  |   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• Acupuncture 20 visits / benefit period</li> <li>• Hearing aids</li> </ul> | <ul style="list-style-type: none"> <li>• Bariatric surgery</li> <li>• Private duty nurse (In-Network only)</li> </ul> | <ul style="list-style-type: none"> <li>• Chiropractic care 30 visits/benefit period</li> <li>• Most coverage provided outside the United States. See <a href="http://www.bcbsglobalcore.com">www.bcbsglobalcore.com</a></li> </ul> |
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**Your Rights to Continue Coverage:** There are agencies that can help if you want to continue your coverage after it ends. The contact information for those agencies is the [plan](#) at 1-866-755-6651, the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or the U.S. Department of Health and Human Services at 1-877-267-2323 x61565 or <https://www.cms.gov/ccio>. Other coverage options may be available to you too, including buying individual insurance coverage through the Health Insurance [Marketplace](#). For more information about the [Marketplace](#), visit <https://www.healthcare.gov/> or call 1-800-318-2596.

**Your Grievance and Appeals Rights:** There are agencies that can help if you have a complaint against your [plan](#) for a denial of a [claim](#). This complaint is called a [grievance](#) or [appeal](#). For more information about your rights, look at the explanation of benefits you will receive for that medical [claim](#). Your [plan](#) documents also provide complete information to submit a [claim](#), [appeal](#), or a [grievance](#) for any reason to your [plan](#). For more information about your rights, this notice, or assistance, contact: the [plan](#) at 1-866-755-6651. You can also contact the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or <https://www.dol.gov/agencies/ebsa>.

### Does this plan provide Minimum Essential Coverage? Yes

If you don't have [Minimum Essential Coverage](#) for a month, you'll have to make a payment when you file your tax return unless you qualify for an exemption from the requirement that you have health coverage for that month.

### Does this plan meet the Minimum Value Standards? Yes

If your [plan](#) doesn't meet the [Minimum Value Standards](#), you may be eligible for a [premium tax credit](#) to help you pay for a [plan](#) through the [Marketplace](#).

**Language Access Services:**

Spanish (Español): Para obtener asistencia en Español, llame al 866-755-6651.

Tagalog (Tagalog): Kung kailangan ninyo ang tulong sa Tagalog tumawag sa 866-755-6651.

Chinese (中文): 如果需要中文的帮助, 请拨打这个号码 866-755-6651.

Navajo (Dine): Dinek'ehgo shika at'ohwol ninisingo, kwijigo holne' 866-755-6651.

————— *To see examples of how this plan might cover costs for a sample medical situation, see the next section.* —————

About these Coverage Examples:



**This is not a cost estimator.** Treatments shown are just examples of how this [plan](#) might cover medical care. Your actual costs will be different depending on the actual care you receive, the prices your [providers](#) charge, and many other factors. Focus on the [cost sharing](#) amounts ([deductibles](#), [copayments](#) and [coinsurance](#)) and [excluded services](#) under the [plan](#). Use this information to compare the portion of costs you might pay under different health [plans](#). Please note these coverage examples are based on self-only coverage.

**Peg is Having a Baby**  
(9 months of in-network pre-natal care and a hospital delivery)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist coinsurance](#) 20%
- Hospital (facility) [coinsurance](#) 20%
- Other (generic pharmacy) [copayment](#) \$10

**This EXAMPLE event includes services like:**  
 Specialist office visits (*prenatal care*)  
 Childbirth/Delivery Professional Services  
 Childbirth/Delivery Facility Services  
 Diagnostic tests (*ultrasounds and blood work*)  
 Specialist visit (*anesthesia*)

**Total Example Cost** \$12,738

In this example, Peg would pay:

Cost Sharing	
Deductibles	\$500
Copayments	\$10
Coinsurance	\$2,400
What isn't covered	
Limits or exclusions	\$60
<b>The total Peg would pay is</b>	<b>\$2,970</b>

**Managing Joe's type 2 Diabetes**  
(a year of routine in-network care of a well-controlled condition)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copayment](#) \$30
- Hospital (facility) [coinsurance](#) 20%
- Other (brand pharmacy) [copayment](#) \$30

**This EXAMPLE event includes services like:**  
 Primary care physician office visits (*including disease education*)  
 Diagnostic tests (*blood work*)  
 Prescription drugs  
 Durable medical equipment (*glucose meter*)

**Total Example Cost** \$7,400

In this example, Joe would pay:

Cost Sharing	
Deductibles	\$500
Copayments	\$800
Coinsurance	\$80
What isn't covered	
Limits or exclusions	\$20
<b>The total Joe would pay is</b>	<b>\$1,400</b>

**Mia's Simple Fracture**  
(in-network emergency room visit and follow up care)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copay](#) \$50
- Hospital (facility) [coinsurance](#) 20%
- Other (DME) [coinsurance](#) 20%

**This EXAMPLE event includes services like:**  
 Emergency room care (*including medical supplies*)  
 Diagnostic test (*x-ray*)  
 Durable medical equipment (*crutches*)  
 Rehabilitation services (*physical therapy*)

**Total Example Cost** \$2,800

In this example, Mia would pay:

Cost Sharing	
Deductibles	\$500
Copayments	\$200
Coinsurance	\$400
What isn't covered	
Limits or exclusions	\$0
<b>The total Mia would pay is</b>	<b>\$1,100</b>

The [plan](#) would be responsible for the other costs of these EXAMPLE covered services.



# Anthem Blue Cross Low PPO





The Summary of Benefits and Coverage (SBC) document will help you choose a health [plan](#). The SBC shows you how you and the [plan](#) would share the cost for covered health care services. **NOTE: Information about the cost of this [plan](#) (called the [premium](#)) will be provided separately.**

**This is only a summary.** For more information about your coverage, or to get a copy of the complete terms of coverage, [www.brmsclaims.com](http://www.brmsclaims.com). For general definitions of common terms, such as [allowed amount](#), [balance billing](#), [coinsurance](#), [copayment](#), [deductible](#), [provider](#), or other underlined terms see the Glossary. You can view the Glossary at [www.brmsclaims.com](http://www.brmsclaims.com) or call 1-866-755-6651 to request a copy.


Important Questions	Answers	Why This Matters:
What is the overall <a href="#">deductible</a> ?	<b>In-Network: \$1,500</b> Individual / <b>\$3,000</b> Family <b>Out of Network: \$4,500</b> Individual / <b>\$9,000</b> Family	Generally, you must pay all the costs from <a href="#">providers</a> up to the <a href="#">deductible</a> amount before this plan begins to pay. If you have other family members on the <a href="#">plan</a> , each family member must meet their own individual <a href="#">deductible</a> until the total amount of <a href="#">deductible</a> expenses paid by all family members meets the overall family <a href="#">deductible</a> .
Are there services covered before you meet your <a href="#">deductible</a> ?	<b>Yes.</b> <a href="#">Preventive</a> care services, office visits, prescription drugs, and Telemedicine visits.	This <a href="#">plan</a> covers some items and services even if you haven't yet met the <a href="#">deductible</a> amount. But a <a href="#">copayment</a> or <a href="#">coinsurance</a> may apply. For example, this plan covers certain preventive services without cost-sharing and before you meet your deductible. See a list of covered preventive services at <a href="https://www.healthcare.gov/coverage/preventive-care-benefits/">https://www.healthcare.gov/coverage/preventive-care-benefits/</a> .
Are there other <a href="#">deductibles</a> for specific services?	Yes. \$150/person or \$450/family for <a href="#">Prescription Drug</a> Tiers 2, 3 and 4. There are no other specific <a href="#">deductibles</a> .	You don't have to meet <a href="#">deductibles</a> for specific services.
What is the <a href="#">out-of-pocket limit</a> for this <a href="#">plan</a> ?	<b>In-Network: \$3,500</b> Individual / <b>\$7,000</b> Family <b>Out of Network: \$10,500</b> Individual / <b>\$21,000</b> Family	The <a href="#">out-of-pocket limit</a> is the most you could pay in a year for covered services. If you have other family members in this <a href="#">plan</a> , they have to meet their own <a href="#">out-of-pocket limits</a> until the overall family <a href="#">out-of-pocket limit</a> has been met.
What is not included in the <a href="#">out-of-pocket limit</a> ?	<a href="#">Premiums</a> , balance-billed charges, penalties for failure to obtain pre-authorization, infertility treatment and health care this <a href="#">plan</a> doesn't cover.	Even though you pay these expenses, they don't count toward the <a href="#">out-of-pocket limit</a> .
Will you pay less if you use a <a href="#">network provider</a> ?	<b>Yes.</b> See <a href="http://www.anthem.com/ca">www.anthem.com/ca</a> or call Benefit & Risk Management Services at 1-866-755-6651 for a list of network providers.	This <a href="#">plan</a> uses a provider <a href="#">network</a> . You will pay less if you use a <a href="#">provider</a> in the plan's <a href="#">network</a> . You will pay the most if you use an <a href="#">out-of-network provider</a> , and you might receive a bill from a <a href="#">provider</a> for the difference between the provider's charge and what your <a href="#">plan</a> pays ( <a href="#">balance billing</a> ). Be aware, your <a href="#">network provider</a> might use an <a href="#">out-of-network provider</a> for some services (such as lab work). Check with your <a href="#">provider</a> before you get services.



Do you need a [referral](#) to see a [specialist](#)?

No.

You can see the [specialist](#) you choose without a [referral](#).

 All [copayment](#) and [coinsurance](#) costs shown in this chart are after your [deductible](#) has been met, if a [deductible](#) applies.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
<b>If you visit a health care <a href="#">provider's</a> office or clinic</b>	Primary care visit to treat an injury or illness	\$15 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	40% <a href="#">coinsurance</a>	None
	<a href="#">Specialist</a> visit	\$15 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply		
	<a href="#">Preventive care/screening/immunization</a>	No charge	40% <a href="#">coinsurance</a>	None
	Anthem Live Health Online	No <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	40% <a href="#">coinsurance</a>	Telemedicine services provided by a primary care physician or specialist will be covered the same as any other office visit with that provider.
<b>If you have a test</b>	<a href="#">Diagnostic test</a> (x-ray, blood work)	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	None
	Imaging (CT/PET scans, MRIs)	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	\$800 maximum / service for Non-Network Providers.
<b>If you need drugs to treat your illness or condition</b> More information about <a href="#">prescription drug coverage</a> is available at <a href="http://www.optumrx.com">www.optumrx.com</a>	Generic drugs	Retail: \$10 <a href="#">copay</a> / prescription Mail Order: \$25 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Preferred brand drugs	Retail: \$35 <a href="#">copay</a> / prescription Mail Order: \$105 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Non-preferred brand drugs	Retail: \$70 <a href="#">copay</a> / prescription Mail Order: \$210 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	<a href="#">Specialty drugs</a>	Retail & Mail Order: 30% coinsurance up to \$250 per prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply. Specialty drugs must be obtained through US Specialty Care Pharmacy (USSC) after one fill at a participating retail pharmacy.
If you have outpatient surgery	Facility fee (e.g., ambulatory surgery center)	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	\$350 maximum / service for Non-Network Providers
	Physician/surgeon fees	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	None
If you need immediate medical attention	<a href="#">Emergency room care</a>	\$150 / visit then 20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	Covered as In-Network	Copay waived if admitted. 10% coinsurance for Emergency Room Physician Fee.
	<a href="#">Emergency medical transportation</a>	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	Covered as In-Network	None
	<a href="#">Urgent care</a>	\$15 <a href="#">copay</a> / office visit	40% <a href="#">coinsurance</a>	None
If you have a hospital stay	Facility fee (e.g., hospital room)	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	\$1,000 maximum / day for Non-Emergency Admissions to Non-Network Providers
	Physician/surgeon fees	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	None
If you need mental health, behavioral health, or substance abuse services	Outpatient services	\$15 <a href="#">copay</a> / office visit 20% <a href="#">coinsurance</a> after <a href="#">deductible</a> / outpatient	40% <a href="#">coinsurance</a>	None
	Inpatient services	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	\$1,000 maximum/day for Non-Emergency Admissions to Non-Network Providers. 10% coinsurance for Inpatient Physician Fee In-Network Providers. 30% coinsurance for Inpatient Physician Fee Non-Network Providers.
If you are pregnant	Office visits	\$15 <a href="#">copay</a> / initial visit <a href="#">deductible</a> does not apply	40% <a href="#">coinsurance</a>	\$1,000 maximum/day for Non-Emergency Admissions to Non-Network Providers.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	Childbirth/delivery professional services	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	Maternity care may include tests and services described elsewhere in the SBC (i.e. ultrasound). *Coverage includes fertility preservation services, see Fertility Preservation section.
	Childbirth/delivery facility services	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	
<b>If you need help recovering or have other special health needs</b>	<a href="#">Home health care</a>	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	100 visits/benefit period one visit by a home health aide equals four hours or less.
	<a href="#">Rehabilitation services</a>	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	*See Therapy Services section.
	<a href="#">Habilitation services</a>	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	*See Therapy Services section.
	<a href="#">Skilled nursing care</a>	20% <a href="#">coinsurance</a> after <a href="#">deductible</a>	40% <a href="#">coinsurance</a>	Must commence within 14 days of an inpatient hospital stay that is at least 3 days. Limited to 100 days per calendar year.
	<a href="#">Durable medical equipment</a>	50% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
	<a href="#">Hospice services</a>	No <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	40% <a href="#">coinsurance</a>	None
<b>If your child needs dental or eye care</b>	Children's eye exam	Not Covered	Not Covered	Refer to Vision Plan
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- |   |   |  |
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**Other Covered Services (Limitations may apply to these services. This isn't a complete list. Please see your [plan](#) document.)**

- |  |   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• Acupuncture 20 visits / benefit period</li> <li>• Hearing aids</li> </ul> | <ul style="list-style-type: none"> <li>• Bariatric surgery</li> <li>• Private duty nurse (In-Network only)</li> </ul> | <ul style="list-style-type: none"> <li>• Chiropractic care 30 visits/benefit period</li> <li>• Most coverage provided outside the United States. See <a href="http://www.bcbsglobalcore.com">www.bcbsglobalcore.com</a></li> </ul> |
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Navajo (Dine): Dinek'ehgo shika at'ohwol ninisingo, kwijigo holne' 866-755-6651.

————— *To see examples of how this plan might cover costs for a sample medical situation, see the next section.* —————

About these Coverage Examples:



**This is not a cost estimator.** Treatments shown are just examples of how this [plan](#) might cover medical care. Your actual costs will be different depending on the actual care you receive, the prices your [providers](#) charge, and many other factors. Focus on the [cost sharing](#) amounts ([deductibles](#), [copayments](#) and [coinsurance](#)) and [excluded services](#) under the [plan](#). Use this information to compare the portion of costs you might pay under different health [plans](#). Please note these coverage examples are based on self-only coverage.

**Peg is Having a Baby**  
(9 months of in-network pre-natal care and a hospital delivery)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist coinsurance](#) 20%
- Hospital (facility) [coinsurance](#) 20%
- Other (generic pharmacy) [copayment](#) \$10

**This EXAMPLE event includes services like:**  
 Specialist office visits (*prenatal care*)  
 Childbirth/Delivery Professional Services  
 Childbirth/Delivery Facility Services  
 Diagnostic tests (*ultrasounds and blood work*)  
 Specialist visit (*anesthesia*)

<b>Total Example Cost</b>	<b>\$12,738</b>
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In this example, Peg would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$10
Coinsurance	\$2,400
<i>What isn't covered</i>	
Limits or exclusions	\$60
<b>The total Peg would pay is</b>	<b>\$2,970</b>

**Managing Joe's type 2 Diabetes**  
(a year of routine in-network care of a well-controlled condition)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copayment](#) \$30
- Hospital (facility) [coinsurance](#) 20%
- Other (brand pharmacy) [copayment](#) \$30

**This EXAMPLE event includes services like:**  
 Primary care physician office visits (*including disease education*)  
 Diagnostic tests (*blood work*)  
 Prescription drugs  
 Durable medical equipment (*glucose meter*)

<b>Total Example Cost</b>	<b>\$7,400</b>
---------------------------	----------------

In this example, Joe would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$800
Coinsurance	\$80
<i>What isn't covered</i>	
Limits or exclusions	\$20
<b>The total Joe would pay is</b>	<b>\$1,400</b>

**Mia's Simple Fracture**  
(in-network emergency room visit and follow up care)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copay](#) \$50
- Hospital (facility) [coinsurance](#) 20%
- Other (DME) [coinsurance](#) 20%

**This EXAMPLE event includes services like:**  
 Emergency room care (*including medical supplies*)  
 Diagnostic test (*x-ray*)  
 Durable medical equipment (*crutches*)  
 Rehabilitation services (*physical therapy*)

<b>Total Example Cost</b>	<b>\$2,800</b>
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In this example, Mia would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$200
Coinsurance	\$400
<i>What isn't covered</i>	
Limits or exclusions	\$0
<b>The total Mia would pay is</b>	<b>\$1,100</b>

The [plan](#) would be responsible for the other costs of these EXAMPLE covered services.



# Anthem Blue Cross Base PPO




The Summary of Benefits and Coverage (SBC) document will help you choose a health [plan](#). The SBC shows you how you and the [plan](#) would share the cost for covered health care services. **NOTE: Information about the cost of this [plan](#) (called the [premium](#)) will be provided separately.**

**This is only a summary.** For more information about your coverage, or to get a copy of the complete terms of coverage, [www.brmsclaims.com](http://www.brmsclaims.com). For general definitions of common terms, such as [allowed amount](#), [balance billing](#), [coinsurance](#), [copayment](#), [deductible](#), [provider](#), or other underlined terms see the Glossary. You can view the Glossary at [www.brmsclaims.com](http://www.brmsclaims.com) or call 1-866-755-6651 to request a copy.

Important Questions	Answers	Why This Matters:
What is the overall <a href="#">deductible</a> ?	<b>In-Network: \$6,100</b> Individual / <b>\$12,200</b> Family <b>Out of Network: \$18,300</b> Individual / <b>\$36,600</b> Family	Generally, you must pay all the costs from <a href="#">providers</a> up to the <a href="#">deductible</a> amount before this plan begins to pay. If you have other family members on the <a href="#">plan</a> , each family member must meet their own individual <a href="#">deductible</a> until the total amount of <a href="#">deductible</a> expenses paid by all family members meets the overall family <a href="#">deductible</a> .
Are there services covered before you meet your <a href="#">deductible</a> ?	<b>Yes.</b> <a href="#">Preventive</a> care services, office visits, prescription drugs, and Telemedicine visits.	This <a href="#">plan</a> covers some items and services even if you haven't yet met the <a href="#">deductible</a> amount. But a <a href="#">copayment</a> or <a href="#">coinsurance</a> may apply. For example, this plan covers certain preventive services without cost-sharing and before you meet your deductible. See a list of covered preventive services at <a href="https://www.healthcare.gov/coverage/preventive-care-benefits/">https://www.healthcare.gov/coverage/preventive-care-benefits/</a> .
Are there other <a href="#">deductibles</a> for specific services?	<b>No.</b>	You don't have to meet <a href="#">deductibles</a> for specific services.
What is the <a href="#">out-of-pocket limit</a> for this <a href="#">plan</a> ?	<b>In-Network: \$6,400</b> Individual / <b>\$12,800</b> Family <b>Out of Network: \$19,200</b> Individual / <b>\$38,400</b> Family	The <a href="#">out-of-pocket limit</a> is the most you could pay in a year for covered services. If you have other family members in this <a href="#">plan</a> , they have to meet their own <a href="#">out-of-pocket limits</a> until the overall family <a href="#">out-of-pocket limit</a> has been met.
What is not included in the <a href="#">out-of-pocket limit</a> ?	<a href="#">Premiums</a> , balance-billed charges, penalties for failure to obtain pre-authorization, infertility treatment and health care this <a href="#">plan</a> doesn't cover.	Even though you pay these expenses, they don't count toward the <a href="#">out-of-pocket limit</a> .
Will you pay less if you use a <a href="#">network provider</a> ?	<b>Yes.</b> See <a href="http://www.anthem.com/ca">www.anthem.com/ca</a> or call Benefit & Risk Management Services at 1-866-755-6651 for a list of network providers.	This <a href="#">plan</a> uses a provider <a href="#">network</a> . You will pay less if you use a <a href="#">provider</a> in the plan's <a href="#">network</a> . You will pay the most if you use an <a href="#">out-of-network provider</a> , and you might receive a bill from a <a href="#">provider</a> for the difference between the provider's charge and what your <a href="#">plan</a> pays ( <a href="#">balance billing</a> ). Be aware, your <a href="#">network provider</a> might use an <a href="#">out-of-network provider</a> for some services (such as lab work). Check with your <a href="#">provider</a> before you get services.
Do you need a <a href="#">referral</a> to see a <a href="#">specialist</a> ?	<b>No.</b>	You can see the <a href="#">specialist</a> you choose without a <a href="#">referral</a> .



 All [copayment](#) and [coinsurance](#) costs shown in this chart are after your [deductible](#) has been met, if a [deductible](#) applies.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
If you visit a health care <a href="#">provider's</a> office or clinic	Primary care visit to treat an injury or illness	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
	<a href="#">Specialist</a> visit	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>		
	<a href="#">Preventive care/screening/immunization</a>	No charge	50% <a href="#">coinsurance</a>	None
	Anthem Live Health Online	No <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	50% <a href="#">coinsurance</a>	Telemedicine services provided by a primary care physician or specialist will be covered the same as any other office visit with that provider.
If you have a test	<a href="#">Diagnostic test</a> (x-ray, blood work)	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
	Imaging (CT/PET scans, MRIs)	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	\$800 maximum / service for Non-Network Providers.



Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
<b>If you need drugs to treat your illness or condition</b> More information about <a href="http://www.optumrx.com">prescription drug coverage</a> is available at <a href="http://www.optumrx.com">www.optumrx.com</a>	Generic drugs	Tier1a: Retail: \$5 <a href="#">copay</a> / prescription Mail Order: \$12.50 <a href="#">copay</a> / prescription Tier1b: Retail: \$15 <a href="#">copay</a> / prescription Mail Order: \$37.50 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Preferred brand drugs	Retail: \$50 <a href="#">copay</a> / prescription Mail Order: \$150 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Non-preferred brand drugs	Retail: \$65 <a href="#">copay</a> / prescription Mail Order: \$195 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	<a href="#">Specialty drugs</a>	Retail & Mail Order: 30% coinsurance up to \$250 per prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply. Specialty drugs must be obtained through US Specialty Care Pharmacy (USSC) after one fill at a participating retail pharmacy.
<b>If you have outpatient surgery</b>	Facility fee (e.g., ambulatory surgery center)	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	\$350 maximum / service for Non-Network Providers
	Physician/surgeon fees	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
<b>If you need immediate medical attention</b>	<a href="#">Emergency room care</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	Covered as In-Network	Copay waived if admitted. 10% coinsurance for Emergency Room Physician Fee.
	<a href="#">Emergency medical transportation</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	Covered as In-Network	None

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	<a href="#">Urgent care</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
If you have a hospital stay	Facility fee (e.g., hospital room)	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	\$1,000 maximum / day for Non-Emergency Admissions to Non-Network Providers
	Physician/surgeon fees	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
If you need mental health, behavioral health, or substance abuse services	Outpatient services	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
	Inpatient services	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	\$1,000 maximum/day for Non-Emergency Admissions to Non-Network Providers. 10% coinsurance for Inpatient Physician Fee In-Network Providers. 30% coinsurance for Inpatient Physician Fee Non-Network Providers.
If you are pregnant	Office visits	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	\$1,000 maximum/day for Non-Emergency Admissions to Non-Network Providers. Maternity care may include tests and services described elsewhere in the SBC (i.e. ultrasound). *Coverage includes fertility preservation services, see Fertility Preservation section.
	Childbirth/delivery professional services	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	
	Childbirth/delivery facility services	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	
If you need help recovering or have other special health needs	<a href="#">Home health care</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	100 visits/benefit period one visit by a home health aide equals four hours or less.
	<a href="#">Rehabilitation services</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	*See Therapy Services section.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	<a href="#">Habilitation services</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	*See Therapy Services section.
	<a href="#">Skilled nursing care</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	Must commence within 14 days of an inpatient hospital stay that is at least 3 days. Limited to 100 days per calendar year.
	<a href="#">Durable medical equipment</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
	<a href="#">Hospice services</a>	0% <a href="#">coinsurance</a> after <a href="#">deductible</a>	50% <a href="#">coinsurance</a>	None
<b>If your child needs dental or eye care</b>	Children's eye exam	Not Covered	Not Covered	Refer to Vision Plan
	Children's glasses	Not Covered	Not Covered	Refer to Vision Plan
	Children's dental check-up	Not Covered	Not Covered	Refer to Dental Plan

### Excluded Services & Other Covered Services:

#### Services Your [Plan](#) Generally Does NOT Cover (Check your policy or [plan](#) document for more information and a list of any other [excluded services](#).)

- Cosmetic surgery
- Dental check-up
- Dental care (Adult)
- Eye exams for a child
- Infertility treatment
- Long term care
- Glasses for a child
- Dental care (Pediatric)
- Routine eye care (Adult)
- Routine foot care unless you have been diagnosed with diabetes
- Weight loss programs

#### Other Covered Services (Limitations may apply to these services. This isn't a complete list. Please see your [plan](#) document.)

- Acupuncture 20 visits / benefit period
- Hearing aids
- Bariatric surgery
- Private duty nurse (In-Network only)
- Chiropractic care 30 visits/benefit period
- Most coverage provided outside the United States. See [www.bcbsglobalcore.com](http://www.bcbsglobalcore.com)

**Your Rights to Continue Coverage:** There are agencies that can help if you want to continue your coverage after it ends. The contact information for those agencies is the [plan](#) at 1-866-755-6651, the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or the U.S. Department of Health and Human Services at 1-877-267-2323 x61565 or <https://www.cms.gov/ccio>. Other coverage options may be available to you too, including buying individual insurance coverage through the Health Insurance [Marketplace](#). For more information about the [Marketplace](#), visit <https://www.healthcare.gov/> or call 1-800-318-2596.

**Your Grievance and Appeals Rights:** There are agencies that can help if you have a complaint against your [plan](#) for a denial of a [claim](#). This complaint is called a [grievance](#) or [appeal](#). For more information about your rights, look at the explanation of benefits you will receive for that medical [claim](#). Your [plan](#) documents also provide complete information to submit a [claim](#), [appeal](#), or a [grievance](#) for any reason to your [plan](#). For more information about your rights, this notice, or assistance, contact: the [plan](#) at 1-866-755-6651. You can also contact the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or <https://www.dol.gov/agencies/ebsa>.

**Does this plan provide Minimum Essential Coverage? Yes**

If you don't have [Minimum Essential Coverage](#) for a month, you'll have to make a payment when you file your tax return unless you qualify for an exemption from the requirement that you have health coverage for that month.

**Does this plan meet the Minimum Value Standards? Yes**

If your [plan](#) doesn't meet the [Minimum Value Standards](#), you may be eligible for a [premium tax credit](#) to help you pay for a [plan](#) through the [Marketplace](#).

**Language Access Services:**

Spanish (Español): Para obtener asistencia en Español, llame al 866-755-6651.

Tagalog (Tagalog): Kung kailangan ninyo ang tulong sa Tagalog tumawag sa 866-755-6651.

Chinese (中文): 如果需要中文的帮助, 请拨打这个号码 866-755-6651.

Navajo (Dine): Dinek'ehgo shika at'ohwol ninisingo, kwijigo holne' 866-755-6651.

————— *To see examples of how this plan might cover costs for a sample medical situation, see the next section.* —————

About these Coverage Examples:



**This is not a cost estimator.** Treatments shown are just examples of how this [plan](#) might cover medical care. Your actual costs will be different depending on the actual care you receive, the prices your [providers](#) charge, and many other factors. Focus on the [cost sharing](#) amounts ([deductibles](#), [copayments](#) and [coinsurance](#)) and [excluded services](#) under the [plan](#). Use this information to compare the portion of costs you might pay under different health [plans](#). Please note these coverage examples are based on self-only coverage.

**Peg is Having a Baby**  
(9 months of in-network pre-natal care and a hospital delivery)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist coinsurance](#) 20%
- Hospital (facility) [coinsurance](#) 20%
- Other (generic pharmacy) [copayment](#) \$10

**This EXAMPLE event includes services like:**

Specialist office visits (*prenatal care*)  
 Childbirth/Delivery Professional Services  
 Childbirth/Delivery Facility Services  
 Diagnostic tests (*ultrasounds and blood work*)  
 Specialist visit (*anesthesia*)

<b>Total Example Cost</b>	<b>\$12,738</b>
---------------------------	-----------------

In this example, Peg would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$10
Coinsurance	\$2,400
<i>What isn't covered</i>	
Limits or exclusions	\$60
<b>The total Peg would pay is</b>	<b>\$2,970</b>

**Managing Joe's type 2 Diabetes**  
(a year of routine in-network care of a well-controlled condition)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copayment](#) \$30
- Hospital (facility) [coinsurance](#) 20%
- Other (brand pharmacy) [copayment](#) \$30

**This EXAMPLE event includes services like:**

Primary care physician office visits (*including disease education*)  
 Diagnostic tests (*blood work*)  
 Prescription drugs  
 Durable medical equipment (*glucose meter*)

<b>Total Example Cost</b>	<b>\$7,400</b>
---------------------------	----------------

In this example, Joe would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$800
Coinsurance	\$80
<i>What isn't covered</i>	
Limits or exclusions	\$20
<b>The total Joe would pay is</b>	<b>\$1,400</b>

**Mia's Simple Fracture**  
(in-network emergency room visit and follow up care)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copay](#) \$50
- Hospital (facility) [coinsurance](#) 20%
- Other (DME) [coinsurance](#) 20%

**This EXAMPLE event includes services like:**

Emergency room care (*including medical supplies*)  
 Diagnostic test (*x-ray*)  
 Durable medical equipment (*crutches*)  
 Rehabilitation services (*physical therapy*)

<b>Total Example Cost</b>	<b>\$2,800</b>
---------------------------	----------------

In this example, Mia would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$200
Coinsurance	\$400
<i>What isn't covered</i>	
Limits or exclusions	\$0
<b>The total Mia would pay is</b>	<b>\$1,100</b>

The [plan](#) would be responsible for the other costs of these EXAMPLE covered services.



# Anthem

# Blue Cross

# High EPO




The Summary of Benefits and Coverage (SBC) document will help you choose a health [plan](#). The SBC shows you how you and the [plan](#) would share the cost for covered health care services. **NOTE: Information about the cost of this [plan](#) (called the [premium](#)) will be provided separately.**

**This is only a summary.** For more information about your coverage, or to get a copy of the complete terms of coverage, [www.brmsclaims.com](http://www.brmsclaims.com). For general definitions of common terms, such as [allowed amount](#), [balance billing](#), [coinsurance](#), [copayment](#), [deductible](#), [provider](#), or other underlined terms see the Glossary. You can view the Glossary at [www.brmsclaims.com](http://www.brmsclaims.com) or call 1-866-755-6651 to request a copy.

Important Questions	Answers	Why This Matters:
What is the overall <a href="#">deductible</a> ?	None	Generally, you must pay all the costs from <a href="#">providers</a> up to the <a href="#">deductible</a> amount before this plan begins to pay. If you have other family members on the <a href="#">plan</a> , each family member must meet their own individual <a href="#">deductible</a> until the total amount of <a href="#">deductible</a> expenses paid by all family members meets the overall family <a href="#">deductible</a> .
Are there services covered before you meet your <a href="#">deductible</a> ?	No.	This <a href="#">plan</a> covers some items and services even if you haven't yet met the <a href="#">deductible</a> amount. But a <a href="#">copayment</a> or <a href="#">coinsurance</a> may apply.
Are there other <a href="#">deductibles</a> for specific services?	No.	You don't have to meet <a href="#">deductibles</a> for specific services.
What is the <a href="#">out-of-pocket limit</a> for this <a href="#">plan</a> ?	\$2,000 Individual / \$4,000 Family	The <a href="#">out-of-pocket limit</a> is the most you could pay in a year for covered services. If you have other family members in this <a href="#">plan</a> , they have to meet their own <a href="#">out-of-pocket limits</a> until the overall family <a href="#">out-of-pocket limit</a> has been met.
What is not included in the <a href="#">out-of-pocket limit</a> ?	<a href="#">Premiums</a> , balance-billed charges, penalties for failure to obtain pre-authorization, infertility treatment and health care this <a href="#">plan</a> doesn't cover.	Even though you pay these expenses, they don't count toward the <a href="#">out-of-pocket limit</a> .
Will you pay less if you use a <a href="#">network provider</a> ?	<b>Yes.</b> See <a href="http://www.anthem.com/ca">www.anthem.com/ca</a> or call Benefit & Risk Management Services at 1-866-755-6651 for a list of network providers.	This <a href="#">plan</a> uses a provider <a href="#">network</a> . You will pay less if you use a <a href="#">provider</a> in the plan's <a href="#">network</a> . You will pay the most if you use an <a href="#">out-of-network provider</a> , and you might receive a bill from a <a href="#">provider</a> for the difference between the provider's charge and what your <a href="#">plan</a> pays ( <a href="#">balance billing</a> ). Be aware, your <a href="#">network provider</a> might use an <a href="#">out-of-network provider</a> for some services (such as lab work). Check with your <a href="#">provider</a> before you get services.
Do you need a <a href="#">referral</a> to see a <a href="#">specialist</a> ?	No.	You can see the <a href="#">specialist</a> you choose without a <a href="#">referral</a> .



 All [copayment](#) and [coinsurance](#) costs shown in this chart are after your [deductible](#) has been met, if a [deductible](#) applies.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
<b>If you visit a health care <a href="#">provider's</a> office or clinic</b>	Primary care visit to treat an injury or illness	\$10 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	Not Covered	None
	<a href="#">Specialist</a> visit	\$30 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply		
	<a href="#">Preventive care/screening/immunization</a>	No charge	Not Covered	None
	Anthem Live Health Online	\$10 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	Not Covered	Telemedicine services provided by a primary care physician or specialist will be covered the same as any other office visit with that provider.
<b>If you have a test</b>	<a href="#">Diagnostic test</a> (x-ray, blood work)	No charge	Not Covered	None
	Imaging (CT/PET scans, MRIs)	\$100 / test	Not Covered	Some services may require <a href="#">preauthorization</a> .
<b>If you need drugs to treat your illness or condition</b> More information about <a href="#">prescription drug coverage</a> is available at <a href="http://www.optumrx.com">www.optumrx.com</a>	Generic drugs	Tier1a: Retail: \$5 <a href="#">copay</a> / prescription Mail Order: \$12.50 <a href="#">copay</a> / prescription Tier1b: Retail: \$15 <a href="#">copay</a> / prescription Mail Order: \$37.50 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Preferred brand drugs	Retail: \$30 <a href="#">copay</a> / prescription Mail Order: \$90 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Non-preferred brand drugs	Retail: \$50 <a href="#">copay</a> / prescription Mail Order: \$150 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)



Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	<a href="#">Specialty drugs</a>	Retail & Mail Order: 30% coinsurance up to \$250 / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply. Specialty drugs must be obtained through US Specialty Care Pharmacy (USSC) after one fill at a participating retail pharmacy.
If you have outpatient surgery	Facility fee (e.g., ambulatory surgery center)	\$125 / visit	Not Covered	Some procedures may require <a href="#">preauthorization</a> .
	Physician/surgeon fees	No Charge	Not Covered	Some procedures may require <a href="#">preauthorization</a> .
If you need immediate medical attention	<a href="#">Emergency room care</a>	\$100 / visit	Covered as In-Network	Inpatient services require <a href="#">preauthorization</a> to avoid a \$400 penalty per occurrence.
	<a href="#">Emergency medical transportation</a>	\$100 / trip	Covered as In-Network	None
	<a href="#">Urgent care</a>	\$10 / visit	Covered as In-Network	None
If you have a hospital stay	Facility fee (e.g., hospital room)	\$250 / admission	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty per occurrence.
	Physician/surgeon fees	No Charge	Not Covered	None
If you need mental health, behavioral health, or substance abuse services	Outpatient services	\$10 <a href="#">copay</a> / office visit	Not Covered	None
	Inpatient services	\$250 / admission	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
If you are pregnant	Office visits	\$10 <a href="#">copay</a> / visit	Not Covered	<a href="#">Cost sharing</a> does not apply to <a href="#">preventive services</a> .
	Childbirth/delivery professional services	No Charge	Not Covered	Maternity care may include tests and services described elsewhere in the SBC (i.e. ultrasound).
	Childbirth/delivery facility services	\$250 / admission	Not Covered	<a href="#">Preauthorization</a> is required for vaginal deliveries requiring more than a 48 hour stay and for cesarean section deliveries requiring

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
				more than a 96 hour stay to avoid a \$400 penalty.
<b>If you need help recovering or have other special health needs</b>	<a href="#">Home health care</a>	\$10 <a href="#">copay</a> / visit	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
	<a href="#">Rehabilitation services</a>	\$10 <a href="#">copay</a> / visit	Not Covered	None
	<a href="#">Habilitation services</a>	\$10 <a href="#">copay</a> / visit	Not Covered	None
	<a href="#">Skilled nursing care</a>	No Charge	Not Covered	Must commence within 14 days of an inpatient hospital stay that is at least 3 days. Limited to 100 days per calendar year. Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
	<a href="#">Durable medical equipment</a>	20% <a href="#">coinsurance</a>	Not Covered	None
	<a href="#">Hospice services</a>	No Charge	Not Covered	Limited to 210 days per lifetime. Includes 15 family bereavement counseling sessions. Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
<b>If your child needs dental or eye care</b>	Children's eye exam	Not Covered	Not Covered	None
	Children's glasses	Not Covered	Not Covered	None
	Children's dental check-up	Not Covered	Not Covered	None

**Excluded Services & Other Covered Services:**

**Services Your [Plan](#) Generally Does NOT Cover (Check your policy or [plan](#) document for more information and a list of any other [excluded services](#).)**

- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>• Cosmetic surgery</li> <li>• Dental check-up</li> <li>• Dental care (Adult)</li> <li>• Eye exams for a child</li> </ul> | <ul style="list-style-type: none"> <li>• Infertility treatment</li> <li>• Long term care</li> <li>• Glasses for a child</li> <li>• Dental care (Pediatric)</li> </ul> | <ul style="list-style-type: none"> <li>• Routine eye care (Adult)</li> <li>• Routine foot care unless you have been diagnosed with diabetes</li> <li>• Weight loss programs</li> </ul> |
|---|---|--|

**Other Covered Services (Limitations may apply to these services. This isn't a complete list. Please see your [plan](#) document.)**

- |  |   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• Acupuncture 20 visits / benefit period</li> <li>• Hearing aids</li> </ul> | <ul style="list-style-type: none"> <li>• Bariatric surgery</li> <li>• Private duty nurse (In-Network only)</li> </ul> | <ul style="list-style-type: none"> <li>• Chiropractic care 30 visits/benefit period</li> <li>• Most coverage provided outside the United States. See <a href="http://www.bcbsglobalcore.com">www.bcbsglobalcore.com</a></li> </ul> |
|--|---|--|

**Your Rights to Continue Coverage:** There are agencies that can help if you want to continue your coverage after it ends. The contact information for those agencies is the [plan](#) at 1-866-755-6651, the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or the U.S. Department of Health and Human Services at 1-877-267-2323 x61565 or <https://www.cms.gov/ccio>. Other coverage options may be available to you too, including buying individual insurance coverage through the Health Insurance [Marketplace](#). For more information about the [Marketplace](#), visit <https://www.healthcare.gov/> or call 1-800-318-2596.

**Your Grievance and Appeals Rights:** There are agencies that can help if you have a complaint against your [plan](#) for a denial of a [claim](#). This complaint is called a [grievance](#) or [appeal](#). For more information about your rights, look at the explanation of benefits you will receive for that medical [claim](#). Your [plan](#) documents also provide complete information to submit a [claim](#), [appeal](#), or a [grievance](#) for any reason to your [plan](#). For more information about your rights, this notice, or assistance, contact: the [plan](#) at 1-866-755-6651. You can also contact the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or <https://www.dol.gov/agencies/ebsa>.

**Does this plan provide Minimum Essential Coverage? Yes**

If you don't have [Minimum Essential Coverage](#) for a month, you'll have to make a payment when you file your tax return unless you qualify for an exemption from the requirement that you have health coverage for that month.

**Does this plan meet the Minimum Value Standards? Yes**

If your [plan](#) doesn't meet the [Minimum Value Standards](#), you may be eligible for a [premium tax credit](#) to help you pay for a [plan](#) through the [Marketplace](#).

**Language Access Services:**

Spanish (Español): Para obtener asistencia en Español, llame al 866-755-6651.

Tagalog (Tagalog): Kung kailangan ninyo ang tulong sa Tagalog tumawag sa 866-755-6651.

Chinese (中文): 如果需要中文的帮助, 请拨打这个号码 866-755-6651.

Navajo (Dine): Dinek'ehgo shika at'ohwol ninisingo, kwijigo holne' 866-755-6651.

————— *To see examples of how this plan might cover costs for a sample medical situation, see the next section.* —————

About these Coverage Examples:



**This is not a cost estimator.** Treatments shown are just examples of how this [plan](#) might cover medical care. Your actual costs will be different depending on the actual care you receive, the prices your [providers](#) charge, and many other factors. Focus on the [cost sharing](#) amounts ([deductibles](#), [copayments](#) and [coinsurance](#)) and [excluded services](#) under the [plan](#). Use this information to compare the portion of costs you might pay under different health [plans](#). Please note these coverage examples are based on self-only coverage.

**Peg is Having a Baby**  
(9 months of in-network pre-natal care and a hospital delivery)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist coinsurance](#) 20%
- Hospital (facility) [coinsurance](#) 20%
- Other (generic pharmacy) [copayment](#) \$10

**This EXAMPLE event includes services like:**  
 Specialist office visits (*prenatal care*)  
 Childbirth/Delivery Professional Services  
 Childbirth/Delivery Facility Services  
 Diagnostic tests (*ultrasounds and blood work*)  
 Specialist visit (*anesthesia*)

<b>Total Example Cost</b>	<b>\$12,738</b>
---------------------------	-----------------

In this example, Peg would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$10
Coinsurance	\$2,400
<i>What isn't covered</i>	
Limits or exclusions	\$60
<b>The total Peg would pay is</b>	<b>\$2,970</b>

**Managing Joe's type 2 Diabetes**  
(a year of routine in-network care of a well-controlled condition)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copayment](#) \$30
- Hospital (facility) [coinsurance](#) 20%
- Other (brand pharmacy) [copayment](#) \$30

**This EXAMPLE event includes services like:**  
 Primary care physician office visits (*including disease education*)  
 Diagnostic tests (*blood work*)  
 Prescription drugs  
 Durable medical equipment (*glucose meter*)

<b>Total Example Cost</b>	<b>\$7,400</b>
---------------------------	----------------

In this example, Joe would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$800
Coinsurance	\$80
<i>What isn't covered</i>	
Limits or exclusions	\$20
<b>The total Joe would pay is</b>	<b>\$1,400</b>

**Mia's Simple Fracture**  
(in-network emergency room visit and follow up care)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copay](#) \$50
- Hospital (facility) [coinsurance](#) 20%
- Other (DME) [coinsurance](#) 20%

**This EXAMPLE event includes services like:**  
 Emergency room care (*including medical supplies*)  
 Diagnostic test (*x-ray*)  
 Durable medical equipment (*crutches*)  
 Rehabilitation services (*physical therapy*)

<b>Total Example Cost</b>	<b>\$2,800</b>
---------------------------	----------------

In this example, Mia would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$200
Coinsurance	\$400
<i>What isn't covered</i>	
Limits or exclusions	\$0
<b>The total Mia would pay is</b>	<b>\$1,100</b>



# Anthem

# Blue Cross


# Low EPO



The Summary of Benefits and Coverage (SBC) document will help you choose a health [plan](#). The SBC shows you how you and the [plan](#) would share the cost for covered health care services. **NOTE: Information about the cost of this [plan](#) (called the [premium](#)) will be provided separately.**

**This is only a summary.** For more information about your coverage, or to get a copy of the complete terms of coverage, [www.brmsclaims.com](http://www.brmsclaims.com). For general definitions of common terms, such as [allowed amount](#), [balance billing](#), [coinsurance](#), [copayment](#), [deductible](#), [provider](#), or other underlined terms see the Glossary. You can view the Glossary at [www.brmsclaims.com](http://www.brmsclaims.com) or call 1-866-755-6651 to request a copy.

Important Questions	Answers	Why This Matters:
What is the overall <a href="#">deductible</a> ?	None	Generally, you must pay all the costs from <a href="#">providers</a> up to the <a href="#">deductible</a> amount before this plan begins to pay. If you have other family members on the <a href="#">plan</a> , each family member must meet their own individual <a href="#">deductible</a> until the total amount of <a href="#">deductible</a> expenses paid by all family members meets the overall family <a href="#">deductible</a> .
Are there services covered before you meet your <a href="#">deductible</a> ?	No.	This <a href="#">plan</a> covers some items and services even if you haven't yet met the <a href="#">deductible</a> amount. But a <a href="#">copayment</a> or <a href="#">coinsurance</a> may apply.
Are there other <a href="#">deductibles</a> for specific services?	Yes. \$150 / person or \$450 / family for Prescription Drugs Tiers 2, 3, and 4.	You must pay all of the costs for these services up to the specific deductible amount before this plan begins to pay for these services.
What is the <a href="#">out-of-pocket limit</a> for this <a href="#">plan</a> ?	\$2,500 Individual / \$5,000 Family	The <a href="#">out-of-pocket limit</a> is the most you could pay in a year for covered services. If you have other family members in this <a href="#">plan</a> , they have to meet their own <a href="#">out-of-pocket limits</a> until the overall family <a href="#">out-of-pocket limit</a> has been met.
What is not included in the <a href="#">out-of-pocket limit</a> ?	Infertility services, <a href="#">premiums</a> , balance-billed charges, penalties for failure to obtain pre-authorization, infertility treatment and health care this <a href="#">plan</a> doesn't cover.	Even though you pay these expenses, they don't count toward the <a href="#">out-of-pocket limit</a> .
Will you pay less if you use a <a href="#">network provider</a> ?	<b>Yes.</b> See <a href="http://www.anthem.com/ca">www.anthem.com/ca</a> or call Benefit & Risk Management Services at 1-866-755-6651 for a list of network providers.	This <a href="#">plan</a> uses a provider <a href="#">network</a> . You will pay less if you use a <a href="#">provider</a> in the plan's <a href="#">network</a> . You will pay the most if you use an <a href="#">out-of-network provider</a> , and you might receive a bill from a <a href="#">provider</a> for the difference between the provider's charge and what your <a href="#">plan</a> pays ( <a href="#">balance billing</a> ). Be aware, your <a href="#">network provider</a> might use an <a href="#">out-of-network provider</a> for some services (such as lab work). Check with your <a href="#">provider</a> before you get services.
Do you need a <a href="#">referral</a> to see a <a href="#">specialist</a> ?	No.	You can see the <a href="#">specialist</a> you choose without a <a href="#">referral</a> .

 All [copayment](#) and [coinsurance](#) costs shown in this chart are after your [deductible](#) has been met, if a [deductible](#) applies.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
<b>If you visit a health care <a href="#">provider's</a> office or clinic</b>	Primary care visit to treat an injury or illness	\$30 <a href="#">copay</a> / visit	Not Covered	None
	<a href="#">Specialist</a> visit	\$40 <a href="#">copay</a> / visit		
	<a href="#">Preventive care/screening/immunization</a>	No charge	Not Covered	None
	Anthem Live Health Online	\$30 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	Not Covered	Telemedicine services provided by a primary care physician or specialist will be covered the same as any other office visit with that provider.
<b>If you have a test</b>	<a href="#">Diagnostic test</a> (x-ray, blood work)	No charge	Not Covered	None
	Imaging (CT/PET scans, MRIs)	\$100 / service	Not Covered	Some services may require <a href="#">preauthorization</a> .
<b>If you need drugs to treat your illness or condition</b> More information about <a href="#">prescription drug coverage</a> is available at <a href="http://www.optumrx.com">www.optumrx.com</a>	Generic drugs	Tier1a: Retail: \$5 <a href="#">copay</a> / prescription Mail Order: \$12.50 <a href="#">copay</a> / prescription Tier1b: Retail: \$15 <a href="#">copay</a> / prescription Mail Order: \$37.50 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Preferred brand drugs	Retail: \$25 <a href="#">copay</a> / prescription Mail Order: \$75 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Non-preferred brand drugs	Retail: \$45 <a href="#">copay</a> / prescription Mail Order: \$135 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)



Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	<a href="#">Specialty drugs</a>	Retail & Mail Order: 30% coinsurance up to \$250 / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply. Specialty drugs must be obtained through US Specialty Care Pharmacy (USSC) after one fill at a participating retail pharmacy.
<b>If you have outpatient surgery</b>	Facility fee (e.g., ambulatory surgery center)	\$250 / visit	Not Covered	Some procedures may require <a href="#">preauthorization</a> .
	Physician/surgeon fees	No Charge	Not Covered	Some procedures may require <a href="#">preauthorization</a> .
<b>If you need immediate medical attention</b>	<a href="#">Emergency room care</a>	\$100 / visit	Covered as In-Network	Inpatient services require <a href="#">preauthorization</a> to avoid a \$400 penalty per occurrence.
	<a href="#">Emergency medical transportation</a>	\$100 / trip	Covered as In-Network	None
	<a href="#">Urgent care</a>	\$30 / visit	Covered as In-Network	None
<b>If you have a hospital stay</b>	Facility fee (e.g., hospital room)	\$500 / admission	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty per occurrence.
	Physician/surgeon fees	No Charge	Not Covered	None
<b>If you need mental health, behavioral health, or substance abuse services</b>	Outpatient services	\$30 <a href="#">copay</a> / office visit	Not Covered	None
	Inpatient services	\$500 / admission	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
<b>If you are pregnant</b>	Office visits	\$30 <a href="#">copay</a> / visit	Not Covered	<a href="#">Cost sharing</a> does not apply to <a href="#">preventive services</a> .
	Childbirth/delivery professional services	No Charge	Not Covered	Maternity care may include tests and services described elsewhere in the SBC (i.e. ultrasound).
	Childbirth/delivery facility services	\$500 / admission	Not Covered	<a href="#">Preauthorization</a> is required for vaginal deliveries requiring more than a 48 hour stay and for cesarean section deliveries requiring



Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
				more than a 96 hour stay to avoid a \$400 penalty.
<b>If you need help recovering or have other special health needs</b>	<a href="#">Home health care</a>	\$30 <a href="#">copay</a> / visit	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
	<a href="#">Rehabilitation services</a>	\$30 <a href="#">copay</a> / visit	Not Covered	None
	<a href="#">Habilitation services</a>	\$30 <a href="#">copay</a> / visit	Not Covered	None
	<a href="#">Skilled nursing care</a>	No Charge	Not Covered	Must commence within 14 days of an inpatient hospital stay that is at least 3 days. Limited to 100 days per calendar year. Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
	<a href="#">Durable medical equipment</a>	20% <a href="#">coinsurance</a>	Not Covered	None
	<a href="#">Hospice services</a>	No Charge	Not Covered	Limited to 210 days per lifetime. Includes 15 family bereavement counseling sessions. Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
<b>If your child needs dental or eye care</b>	Children's eye exam	Not Covered	Not Covered	None
	Children's glasses	Not Covered	Not Covered	None
	Children's dental check-up	Not Covered	Not Covered	None

### Excluded Services & Other Covered Services:

**Services Your [Plan](#) Generally Does NOT Cover (Check your policy or [plan](#) document for more information and a list of any other [excluded services](#).)**

- |                         |                           |  |
|-------------------------|---------------------------|--|
| • Cosmetic surgery      | • Infertility treatment   | • Routine eye care (Adult)                                       |
| • Dental check-up       | • Long term care          | • Routine foot care unless you have been diagnosed with diabetes |
| • Dental care (Adult)   | • Glasses for a child     | • Weight loss programs   |
| • Eye exams for a child | • Dental care (Pediatric) |  |

**Other Covered Services (Limitations may apply to these services. This isn't a complete list. Please see your [plan](#) document.)**

- |  |  |  |
|--|--|--|
| • Acupuncture 20 visits / benefit period | • Bariatric surgery                    | • Chiropractic care 30 visits/benefit period   |
| • Hearing aids                           | • Private duty nurse (In-Network only) | • Most coverage provided outside the United States. See <a href="http://www.bcbsglobalcore.com">www.bcbsglobalcore.com</a> |

**Your Rights to Continue Coverage:** There are agencies that can help if you want to continue your coverage after it ends. The contact information for those agencies is the [plan](#) at 1-866-755-6651, the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or the U.S. Department of Health and Human Services at 1-877-267-2323 x61565 or <https://www.cms.gov/ccio>. Other coverage options may be available to you too, including buying individual insurance coverage through the Health Insurance [Marketplace](#). For more information about the [Marketplace](#), visit <https://www.healthcare.gov/> or call 1-800-318-2596.

**Your Grievance and Appeals Rights:** There are agencies that can help if you have a complaint against your [plan](#) for a denial of a [claim](#). This complaint is called a [grievance](#) or [appeal](#). For more information about your rights, look at the explanation of benefits you will receive for that medical [claim](#). Your [plan](#) documents also provide complete information to submit a [claim](#), [appeal](#), or a [grievance](#) for any reason to your [plan](#). For more information about your rights, this notice, or assistance, contact: the [plan](#) at 1-866-755-6651. You can also contact the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or <https://www.dol.gov/agencies/ebsa>.

**Does this plan provide Minimum Essential Coverage? Yes**

If you don't have [Minimum Essential Coverage](#) for a month, you'll have to make a payment when you file your tax return unless you qualify for an exemption from the requirement that you have health coverage for that month.

**Does this plan meet the Minimum Value Standards? Yes**

If your [plan](#) doesn't meet the [Minimum Value Standards](#), you may be eligible for a [premium tax credit](#) to help you pay for a [plan](#) through the [Marketplace](#).

**Language Access Services:**

Spanish (Español): Para obtener asistencia en Español, llame al 866-755-6651.

Tagalog (Tagalog): Kung kailangan ninyo ang tulong sa Tagalog tumawag sa 866-755-6651.

Chinese (中文): 如果需要中文的帮助, 请拨打这个号码 866-755-6651.

Navajo (Dine): Dinek'ehgo shika at'ohwol ninisingo, kwijigo holne' 866-755-6651.

————— *To see examples of how this plan might cover costs for a sample medical situation, see the next section.* —————

About these Coverage Examples:



**This is not a cost estimator.** Treatments shown are just examples of how this [plan](#) might cover medical care. Your actual costs will be different depending on the actual care you receive, the prices your [providers](#) charge, and many other factors. Focus on the [cost sharing](#) amounts ([deductibles](#), [copayments](#) and [coinsurance](#)) and [excluded services](#) under the [plan](#). Use this information to compare the portion of costs you might pay under different health [plans](#). Please note these coverage examples are based on self-only coverage.

**Peg is Having a Baby**  
(9 months of in-network pre-natal care and a hospital delivery)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist coinsurance](#) 20%
- Hospital (facility) [coinsurance](#) 20%
- Other (generic pharmacy) [copayment](#) \$10

**This EXAMPLE event includes services like:**  
 Specialist office visits (*prenatal care*)  
 Childbirth/Delivery Professional Services  
 Childbirth/Delivery Facility Services  
 Diagnostic tests (*ultrasounds and blood work*)  
 Specialist visit (*anesthesia*)

<b>Total Example Cost</b>	<b>\$12,738</b>
---------------------------	-----------------

In this example, Peg would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$10
Coinsurance	\$2,400
<i>What isn't covered</i>	
Limits or exclusions	\$60
<b>The total Peg would pay is</b>	<b>\$2,970</b>

**Managing Joe's type 2 Diabetes**  
(a year of routine in-network care of a well-controlled condition)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copayment](#) \$30
- Hospital (facility) [coinsurance](#) 20%
- Other (brand pharmacy) [copayment](#) \$30

**This EXAMPLE event includes services like:**  
 Primary care physician office visits (*including disease education*)  
 Diagnostic tests (*blood work*)  
 Prescription drugs  
 Durable medical equipment (*glucose meter*)

<b>Total Example Cost</b>	<b>\$7,400</b>
---------------------------	----------------

In this example, Joe would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$800
Coinsurance	\$80
<i>What isn't covered</i>	
Limits or exclusions	\$20
<b>The total Joe would pay is</b>	<b>\$1,400</b>

**Mia's Simple Fracture**  
(in-network emergency room visit and follow up care)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copay](#) \$50
- Hospital (facility) [coinsurance](#) 20%
- Other (DME) [coinsurance](#) 20%

**This EXAMPLE event includes services like:**  
 Emergency room care (*including medical supplies*)  
 Diagnostic test (*x-ray*)  
 Durable medical equipment (*crutches*)  
 Rehabilitation services (*physical therapy*)

<b>Total Example Cost</b>	<b>\$2,800</b>
---------------------------	----------------

In this example, Mia would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$200
Coinsurance	\$400
<i>What isn't covered</i>	
Limits or exclusions	\$0
<b>The total Mia would pay is</b>	<b>\$1,100</b>




# Anthem Blue Cross Base EPO



The Summary of Benefits and Coverage (SBC) document will help you choose a health [plan](#). The SBC shows you how you and the [plan](#) would share the cost for covered health care services. **NOTE: Information about the cost of this [plan](#) (called the [premium](#)) will be provided separately.**

**This is only a summary.** For more information about your coverage, or to get a copy of the complete terms of coverage, [www.brmsclaims.com](http://www.brmsclaims.com). For general definitions of common terms, such as [allowed amount](#), [balance billing](#), [coinsurance](#), [copayment](#), [deductible](#), [provider](#), or other underlined terms see the Glossary. You can view the Glossary at [www.brmsclaims.com](http://www.brmsclaims.com) or call 1-866-755-6651 to request a copy.

Important Questions	Answers	Why This Matters:
What is the overall <a href="#">deductible</a> ?	None	Generally, you must pay all the costs from <a href="#">providers</a> up to the <a href="#">deductible</a> amount before this plan begins to pay. If you have other family members on the <a href="#">plan</a> , each family member must meet their own individual <a href="#">deductible</a> until the total amount of <a href="#">deductible</a> expenses paid by all family members meets the overall family <a href="#">deductible</a> .
Are there services covered before you meet your <a href="#">deductible</a> ?	No.	This <a href="#">plan</a> covers some items and services even if you haven't yet met the <a href="#">deductible</a> amount. But a <a href="#">copayment</a> or <a href="#">coinsurance</a> may apply.
Are there other <a href="#">deductibles</a> for specific services?	Yes. \$150 / person or \$450 / family for Prescription Drugs Tiers 2, 3, and 4.	You must pay all of the costs for these services up to the specific deductible amount before this plan begins to pay for these services.
What is the <a href="#">out-of-pocket limit</a> for this <a href="#">plan</a> ?	\$2,500 Individual / \$5,000 Family	The <a href="#">out-of-pocket limit</a> is the most you could pay in a year for covered services. If you have other family members in this <a href="#">plan</a> , they have to meet their own <a href="#">out-of-pocket limits</a> until the overall family <a href="#">out-of-pocket limit</a> has been met.
What is not included in the <a href="#">out-of-pocket limit</a> ?	Infertility services, <a href="#">premiums</a> , balance-billed charges, penalties for failure to obtain pre-authorization, infertility treatment and health care this <a href="#">plan</a> doesn't cover.	Even though you pay these expenses, they don't count toward the <a href="#">out-of-pocket limit</a> .
Will you pay less if you use a <a href="#">network provider</a> ?	<b>Yes.</b> See <a href="http://www.anthem.com/ca">www.anthem.com/ca</a> or call Benefit & Risk Management Services at 1-866-755-6651 for a list of network providers.	This <a href="#">plan</a> uses a provider <a href="#">network</a> . You will pay less if you use a <a href="#">provider</a> in the plan's <a href="#">network</a> . You will pay the most if you use an <a href="#">out-of-network provider</a> , and you might receive a bill from a <a href="#">provider</a> for the difference between the provider's charge and what your <a href="#">plan</a> pays ( <a href="#">balance billing</a> ). Be aware, your <a href="#">network provider</a> might use an <a href="#">out-of-network provider</a> for some services (such as lab work). Check with your <a href="#">provider</a> before you get services.
Do you need a <a href="#">referral</a> to see a <a href="#">specialist</a> ?	No.	You can see the <a href="#">specialist</a> you choose without a <a href="#">referral</a> .

 All [copayment](#) and [coinsurance](#) costs shown in this chart are after your [deductible](#) has been met, if a [deductible](#) applies.

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
<b>If you visit a health care <a href="#">provider's</a> office or clinic</b>	Primary care visit to treat an injury or illness	\$35 <a href="#">copay</a> / visit	Not Covered	None
	<a href="#">Specialist</a> visit	\$45 <a href="#">copay</a> / visit		
	<a href="#">Preventive care/screening/immunization</a>	No charge	Not Covered	None
	Anthem Live Health Online	\$35 <a href="#">copay</a> / visit <a href="#">deductible</a> does not apply	Not Covered	Telemedicine services provided by a primary care physician or specialist will be covered the same as any other office visit with that provider.
<b>If you have a test</b>	<a href="#">Diagnostic test</a> (x-ray, blood work)	No charge	Not Covered	None
	Imaging (CT/PET scans, MRIs)	\$100 / service	Not Covered	Some services may require <a href="#">preauthorization</a> .
<b>If you need drugs to treat your illness or condition</b> More information about <a href="#">prescription drug coverage</a> is available at <a href="http://www.optumrx.com">www.optumrx.com</a>	Generic drugs	Tier1a: Retail: \$5 <a href="#">copay</a> / prescription Mail Order: \$12.50 <a href="#">copay</a> / prescription Tier1b: Retail: \$15 <a href="#">copay</a> / prescription Mail Order: \$37.50 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Preferred brand drugs	Retail: \$30 <a href="#">copay</a> / prescription Mail Order: \$90 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)
	Non-preferred brand drugs	Retail: \$50 <a href="#">copay</a> / prescription Mail Order: \$150 <a href="#">copay</a> / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply (retail); 90-day supply (mail order)

Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
	<a href="#">Specialty drugs</a>	Retail & Mail Order: 30% coinsurance up to \$250 / prescription	Retail: 50% coinsurance up to \$250 / prescription Mail Order: Not Covered	Covers up to a 30-day supply. Specialty drugs must be obtained through US Specialty Care Pharmacy (USSC) after one fill at a participating retail pharmacy.
If you have outpatient surgery	Facility fee (e.g., ambulatory surgery center)	\$375 / visit	Not Covered	Some procedures may require <a href="#">preauthorization</a> .
	Physician/surgeon fees	No Charge	Not Covered	Some procedures may require <a href="#">preauthorization</a> .
If you need immediate medical attention	<a href="#">Emergency room care</a>	\$100 / visit	Covered as In-Network	Inpatient services require <a href="#">preauthorization</a> to avoid a \$400 penalty per occurrence.
	<a href="#">Emergency medical transportation</a>	\$100 / trip	Covered as In-Network	None
	<a href="#">Urgent care</a>	\$35 / visit	Covered as In-Network	None
If you have a hospital stay	Facility fee (e.g., hospital room)	\$750 / admission	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty per occurrence.
	Physician/surgeon fees	No Charge	Not Covered	None
If you need mental health, behavioral health, or substance abuse services	Outpatient services	\$35 <a href="#">copay</a> / office visit	Not Covered	None
	Inpatient services	\$750 / admission	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
If you are pregnant	Office visits	\$35 <a href="#">copay</a> / visit	Not Covered	<a href="#">Cost sharing</a> does not apply to <a href="#">preventive services</a> .
	Childbirth/delivery professional services	No Charge	Not Covered	Maternity care may include tests and services described elsewhere in the SBC (i.e. ultrasound).
	Childbirth/delivery facility services	\$750 / admission	Not Covered	<a href="#">Preauthorization</a> is required for vaginal deliveries requiring more than a 48 hour stay and for cesarean section deliveries requiring



Common Medical Event	Services You May Need	What You Will Pay		Limitations, Exceptions, & Other Important Information
		Network Provider (You will pay the least)	Out-of-Network Provider (You will pay the most)	
				more than a 96 hour stay to avoid a \$400 penalty.
If you need help recovering or have other special health needs	<a href="#">Home health care</a>	\$35 <a href="#">copay</a> / visit	Not Covered	Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
	<a href="#">Rehabilitation services</a>	\$35 <a href="#">copay</a> / visit	Not Covered	None
	<a href="#">Habilitation services</a>	\$35 <a href="#">copay</a> / visit	Not Covered	None
	<a href="#">Skilled nursing care</a>	No Charge	Not Covered	Must commence within 14 days of an inpatient hospital stay that is at least 3 days. Limited to 100 days per calendar year. Services require <a href="#">preauthorization</a> to avoid \$400 penalty.
	<a href="#">Durable medical equipment</a>	20% <a href="#">coinsurance</a>	Not Covered	None
	<a href="#">Hospice services</a>	No Charge	Not Covered	None
If your child needs dental or eye care	Children's eye exam	Not Covered	Not Covered	None
	Children's glasses	Not Covered	Not Covered	None
	Children's dental check-up	Not Covered	Not Covered	None

**Excluded Services & Other Covered Services:**

**Services Your [Plan](#) Generally Does NOT Cover (Check your policy or [plan](#) document for more information and a list of any other [excluded services](#).)**

- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"> <li>• Cosmetic surgery</li> <li>• Dental check-up</li> <li>• Dental care (Adult)</li> <li>• Eye exams for a child</li> </ul> | <ul style="list-style-type: none"> <li>• Infertility treatment</li> <li>• Long term care</li> <li>• Glasses for a child</li> <li>• Dental care (Pediatric)</li> </ul> | <ul style="list-style-type: none"> <li>• Routine eye care (Adult)</li> <li>• Routine foot care unless you have been diagnosed with diabetes</li> <li>• Weight loss programs</li> </ul> |
|---|---|--|

**Other Covered Services (Limitations may apply to these services. This isn't a complete list. Please see your [plan](#) document.)**

- |  |   |  |
|--|---|--|
| <ul style="list-style-type: none"> <li>• Acupuncture 20 visits / benefit period</li> <li>• Hearing aids</li> </ul> | <ul style="list-style-type: none"> <li>• Bariatric surgery</li> <li>• Private duty nurse (In-Network only)</li> </ul> | <ul style="list-style-type: none"> <li>• Chiropractic care 30 visits/benefit period</li> <li>• Most coverage provided outside the United States. See <a href="http://www.bcbsglobalcore.com">www.bcbsglobalcore.com</a></li> </ul> |
|--|---|--|



**Your Rights to Continue Coverage:** There are agencies that can help if you want to continue your coverage after it ends. The contact information for those agencies is the [plan](#) at 1-866-755-6651, the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or the U.S. Department of Health and Human Services at 1-877-267-2323 x61565 or <https://www.cms.gov/ccio>. Other coverage options may be available to you too, including buying individual insurance coverage through the Health Insurance [Marketplace](#). For more information about the [Marketplace](#), visit <https://www.healthcare.gov/> or call 1-800-318-2596.

**Your Grievance and Appeals Rights:** There are agencies that can help if you have a complaint against your [plan](#) for a denial of a [claim](#). This complaint is called a [grievance](#) or [appeal](#). For more information about your rights, look at the explanation of benefits you will receive for that medical [claim](#). Your [plan](#) documents also provide complete information to submit a [claim](#), [appeal](#), or a [grievance](#) for any reason to your [plan](#). For more information about your rights, this notice, or assistance, contact: the [plan](#) at 1-866-755-6651. You can also contact the Department of Labor's Employee Benefits Security Administration at 1-866-444-3272 or <https://www.dol.gov/agencies/ebsa>.

**Does this plan provide Minimum Essential Coverage? Yes**

If you don't have [Minimum Essential Coverage](#) for a month, you'll have to make a payment when you file your tax return unless you qualify for an exemption from the requirement that you have health coverage for that month.

**Does this plan meet the Minimum Value Standards? Yes**

If your [plan](#) doesn't meet the [Minimum Value Standards](#), you may be eligible for a [premium tax credit](#) to help you pay for a [plan](#) through the [Marketplace](#).

**Language Access Services:**

Spanish (Español): Para obtener asistencia en Español, llame al 866-755-6651.

Tagalog (Tagalog): Kung kailangan ninyo ang tulong sa Tagalog tumawag sa 866-755-6651.

Chinese (中文): 如果需要中文的帮助, 请拨打这个号码 866-755-6651.

Navajo (Dine): Dinek'ehgo shika at'ohwol ninisingo, kwijigo holne' 866-755-6651.

————— *To see examples of how this plan might cover costs for a sample medical situation, see the next section.* —————

About these Coverage Examples:



**This is not a cost estimator.** Treatments shown are just examples of how this [plan](#) might cover medical care. Your actual costs will be different depending on the actual care you receive, the prices your [providers](#) charge, and many other factors. Focus on the [cost sharing](#) amounts ([deductibles](#), [copayments](#) and [coinsurance](#)) and [excluded services](#) under the [plan](#). Use this information to compare the portion of costs you might pay under different health [plans](#). Please note these coverage examples are based on self-only coverage.

**Peg is Having a Baby**  
(9 months of in-network pre-natal care and a hospital delivery)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist coinsurance](#) 20%
- Hospital (facility) [coinsurance](#) 20%
- Other (generic pharmacy) [copayment](#) \$10

**This EXAMPLE event includes services like:**  
 Specialist office visits (*prenatal care*)  
 Childbirth/Delivery Professional Services  
 Childbirth/Delivery Facility Services  
 Diagnostic tests (*ultrasounds and blood work*)  
 Specialist visit (*anesthesia*)

<b>Total Example Cost</b>	<b>\$12,738</b>
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In this example, Peg would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$10
Coinsurance	\$2,400
<i>What isn't covered</i>	
Limits or exclusions	\$60
<b>The total Peg would pay is</b>	<b>\$2,970</b>

**Managing Joe's type 2 Diabetes**  
(a year of routine in-network care of a well-controlled condition)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copayment](#) \$30
- Hospital (facility) [coinsurance](#) 20%
- Other (brand pharmacy) [copayment](#) \$30

**This EXAMPLE event includes services like:**  
 Primary care physician office visits (*including disease education*)  
 Diagnostic tests (*blood work*)  
 Prescription drugs  
 Durable medical equipment (*glucose meter*)

<b>Total Example Cost</b>	<b>\$7,400</b>
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In this example, Joe would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$800
Coinsurance	\$80
<i>What isn't covered</i>	
Limits or exclusions	\$20
<b>The total Joe would pay is</b>	<b>\$1,400</b>

**Mia's Simple Fracture**  
(in-network emergency room visit and follow up care)

- The [plan's](#) overall [deductible](#) \$500
- [Specialist copay](#) \$50
- Hospital (facility) [coinsurance](#) 20%
- Other (DME) [coinsurance](#) 20%

**This EXAMPLE event includes services like:**  
 Emergency room care (*including medical supplies*)  
 Diagnostic test (*x-ray*)  
 Durable medical equipment (*crutches*)  
 Rehabilitation services (*physical therapy*)

<b>Total Example Cost</b>	<b>\$2,800</b>
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In this example, Mia would pay:

<i>Cost Sharing</i>	
Deductibles	\$500
Copayments	\$200
Coinsurance	\$400
<i>What isn't covered</i>	
Limits or exclusions	\$0
<b>The total Mia would pay is</b>	<b>\$1,100</b>

The [plan](#) would be responsible for the other costs of these EXAMPLE covered services.



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Teladoc gives you 24/7 access to doctors by phone, video or app for non-emergency conditions.

We treat allergies, flu and cold symptoms, pink eye, sinus infections, headaches, upset stomach and more.



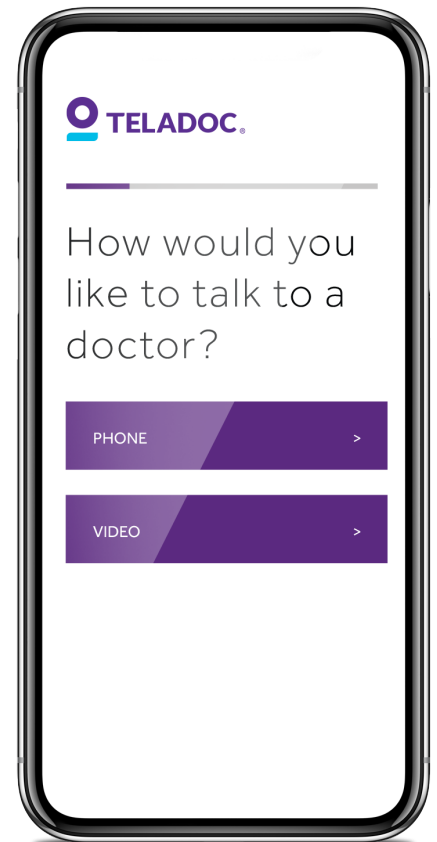
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Get a prescription or refill if needed




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\*Teladoc is not available internationally.

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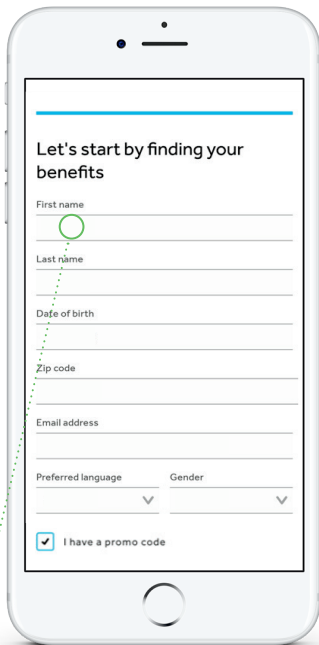
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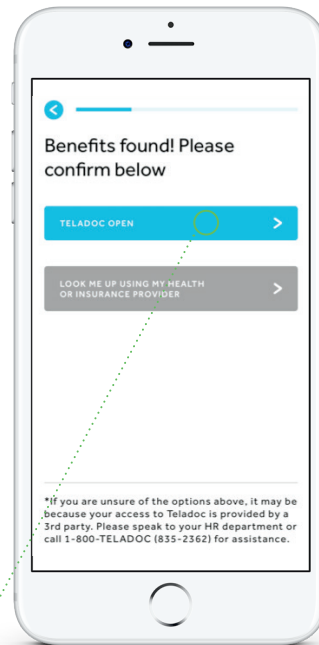
## Get started with Teladoc

It's quick and easy to set up your account through our app. Simply download the Teladoc app and follow the four steps you see below.



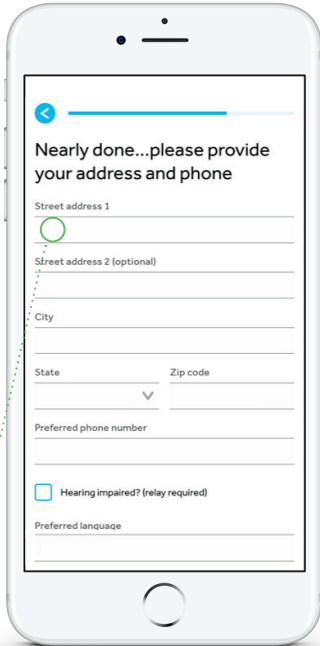
### 1. Confirm benefits

Provide some information about yourself to confirm your eligibility.



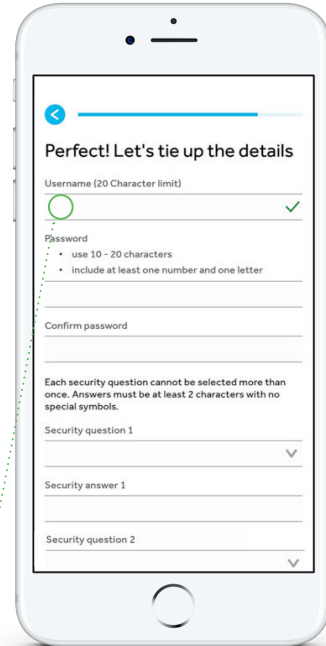
### 2. Benefit confirmation

We'll confirm that we found your benefits and you'll continue creating your account.



● **3. Create account**

Please provide your contact information and preferred language.



● **4. Complete account**

Create a username, password, and pick security questions to ensure your account is secure.

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# Let us bring your medications to you

With Optum® Home Delivery, you can get a 3-month supply of your long-term medications. Plus, we mail them to you with free standard shipping.

## Want more reasons?



### Skip the trips

We deliver your medication to your door. You don't even have to leave home or wait in the pharmacy line.



### Save money

You may pay less than what you do at in-store pharmacies. And, standard shipping is free.



### Stay on track

With a 3-month supply, you may be less likely to miss a dose. You can even sign up for automatic refills.

## Flexible Payment Options

Make one payment upfront. Or split it up into 3 equal monthly payments.

## We're here when you need us

Use the website and app any time to track orders, request refills, price medications and more. Pharmacists and customer support team are available 24/7.

## Ready for home delivery?

Here are the ways to sign up.

- [optumrx.com](https://optumrx.com) or with the Optum Rx app.
- Or ask your doctor to send an electronic prescription to Optum Rx.
- Or call the number on your member ID card.

Scan code.  
Log in. Sign up.



## Frequently Asked Questions

### Is the Optum Home Delivery pharmacy in my plan's network?

Yes, it's part of your plan's pharmacy network.

### Once I've enrolled in home delivery, how long will it take to get my medication(s)?

Medications should arrive within 5 business days after we receive the complete order.

### Do I need to set up a home delivery account?

Yes. Before we can ship your first order, you need to set up your account and provide your payment method (credit card, debit card or bank account). Using your account, you can go online or use the app any time to place and track orders, check prices, and more.

### What is a long-term medication?

Long-term medications are those you take on a regular basis. These may be taken for high blood pressure, cholesterol, and depression, just to name a few.

### Can I use home delivery for any medication?

Use home delivery for long-term medications. See which of your prescriptions can be filled through home delivery by going online or using the app.

### Can I set up medication reminders?

Yes. Go online or use the app to check your profile and turn on email and phone notifications and reminders.

### How does the automatic refill program work?

Go online or use the app to see and enroll all eligible medications. Then, we'll send your refills when it's time. We notify you before we ship and we'll use your approved payment method on file. It's that easy.

Confused about health care terms? Visit [justplainclear.com](https://www.justplainclear.com).

## Sign up for home delivery today

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# Get smart about prescriptions

Our online tools make it easy

Visit [optumrx.com](https://optumrx.com) to register your account. You'll need information from your member ID card to sign up and access your account details and prescriptions.



**Price a drug** – Search your current or new medications to see costs at pharmacies near you. If you're taking a brand-name drug, you can also see prices for generic options.



**My prescriptions** – See your current prescriptions along with information about how to use them and possible side effects.



**View my claims** – See which prescriptions you've filled and how much you paid.



**Pharmacy locator** – Search for network pharmacies near you – or find a pharmacy when you're traveling.



**Manage prescriptions on-the-go** – For added convenience, download the Optum Rx app.



To learn more today, scan this code with your phone's camera and click on the link or go to [optumrx.com/getstarted](https://optumrx.com/getstarted) for info on Optum Rx.



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# Welcome to your specialty pharmacy

Optum Rx offers specialty medication support through Optum Specialty Pharmacy so that you can get specialty prescriptions and personalized support the way you want it.

## What is a specialty medication?

A specialty medication may be injected, infused, taken by mouth or inhaled. It's different from other medication because it:

- May need ongoing clinical oversight and extra education
- May have unique storage or shipping needs
- May not be filled at retail pharmacies
- May need infusion or home nursing

## What services does the specialty pharmacy provide?

You'll get access to these helpful resources.

### Easy prescriptions

- Get medications delivered on time, accurately, and affordably
- Order refills by phone or online\*
- Receive support through virtual visits, calls, live chat, or text

### Expert guidance

- Connect with a clinician to help manage your medications
- Find out about financial help for your medication
- Learn more about your condition and treatment through videos

**We're here for you 24/7**

**1-855-427-4682**  
(TTY 711)

**[specialty.optumrx.com](https://specialty.optumrx.com)**

**Sign in or register today**



## Guiding your health journey

Managing and living with a complex health condition is challenging. We're here for you when you need us.



### Getting started

Call **1-855-427-4682** to switch.

Pharmacists and patient care coordinators are ready 24/7 to help you:

- Transfer your prescription
- Find affordable ways to get your medication
- Explain how to use the specialty pharmacy



### Personalized support

We're always ready by phone to answer questions about your medication, side effects and more. You can also use the tools below:

**Virtual visits** – Set up a video chat with an expert in your condition. Ask questions from the privacy of your home. You can even record your session to review later or to share with your caregivers.

**Video series** – Watch videos from other patients with specialty conditions. Hear about their treatment and how they are doing.



### Working with your pharmacist or nurse

- Tell us how your therapy is going, if you're having trouble keeping up, having side effects or forgetting to take your medication.
- We can help you find wellness programs to help you stay on track.
- If you're part of a clinical management program, follow your care plan and tell us about any new medications you're taking.



### Staying on track

A few days before your next fill, we'll send you a refill reminder by email, phone or text. Call us to sign up for text messages.

Optum® Specialty Pharmacy can only fill specialty medications. Use your home delivery or retail pharmacy for your non-specialty prescriptions. You may pay less with home delivery and lower-cost options.

\*Some medications for more complex conditions do not qualify for online ordering. Call 1-855-427-4682 and speak with a patient care coordinator to order those refills.



Optum Rx specializes in the delivery, clinical management and affordability of prescription medications and consumer health products. We are an Optum® company – a leading provider of integrated health services. Learn more at [optum.com](https://www.optum.com).

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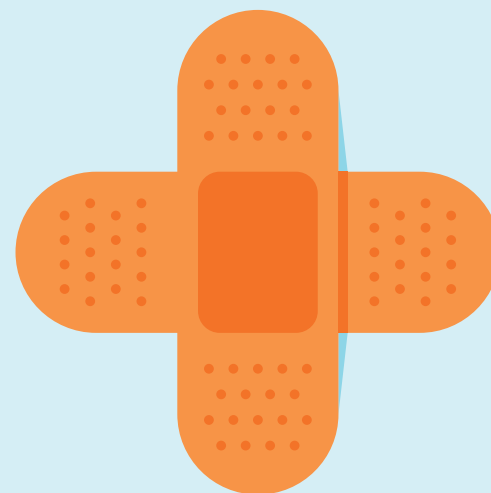
Optum Specialty Pharmacy is affiliated with Optum Rx, a pharmacy benefits manager. You may not be required to use Optum Specialty Pharmacy for your specialty medication. There may other pharmacies available in your network. Call the customer service number on your member ID card or visit your plan website and use the pharmacy locator to view listings. Your receipt of this communication is acknowledgment of the information provided. You may contact the customer service number on your member ID card for any questions or concerns.

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# Make your health a priority

Get your flu shot and other routine vaccines



## Flu shots

Every year millions of people get the flu. Most people who get the flu have a mild illness. But for some, it can lead to serious health problems. The flu is caused by influenza viruses that affect the lungs, throat and nose. It can be contagious. According to the Centers for Disease Control and Prevention (CDC), getting the yearly flu vaccine is the best way to protect yourself from the flu.<sup>1</sup> The CDC recommends a yearly **flu vaccine** for everyone 6 months of age and older.

## Routine vaccines

Vaccines help protect you from serious infectious diseases throughout your life – from infancy to early adulthood and into old age. The list of routine vaccines on page 3 are recommended by the Advisory Committee on Immunization Practices (ACIP). This is a federal committee comprised of immunization experts that is convened by the CDC. Routine vaccines are covered on most plans and can help you and your family stay healthy.

## Schedule your flu shot or vaccine today

You can schedule a flu shot or a routine vaccine at a network pharmacy. Go to [OptumRx.com](https://www.optumrx.com) and search for a retail pharmacy nearest you.

**Many vaccines are available on a walk-in basis.**

Show your member ID card before getting your flu shot or vaccine. Most plans cover routine vaccines at 100% when you use network pharmacies.

For more information, sign in to [OptumRx.com](https://www.optumrx.com) or call the number on your member ID card.





## Retail pharmacies

This list shows the larger retail chain pharmacies in our network, but is not the full list. For a more complete list, you can log in to [OptumRx.com](https://www.optumrx.com) or call the number on your health plan or prescription ID card. Pharmacists give the vaccines at these locations.

- **Ahold USA** (Giant Food Stores, Giant of Maryland, Hannaford, Stop & Shop)
- **Albertsons** Acme, Carrs, Haggen, Market Street, Osco Drug, Pavilions, Safeway, Shaw's Supermarket, Randalls, Sav-On Drugs, Tom Thumb, United, Vons
- **CVS Pharmacy**
- **Four B Corporation** (Hen House, Price Chopper)
- **H-E-B Pharmacy**
- **Hy-Vee Pharmacy**
- **Kmart Pharmacy**
- **The Kroger Co.** (Baker's Pharmacy, City Market, Dillons, Fred Meyer, Fry's, Gerbes Pharmacy, Jay C Food Stores, King Soopers, Mariano's, Metro Market, Pay Less, Pick 'n Save, QFC, Ralphs, Smiths Food and Drug)
- **K-VA-T Food Stores, Inc.** (Food City)
- **Meijer Pharmacies**
- **Publix**
- **Rite Aid**
- **Thrifty White Pharmacy**
- **Tops Markets**
- **Walgreens Pharmacy** (Duane Reade, Walgreens)
- **Walmart Pharmacy**
- **Wegmans**



## What vaccines do you need?

Talk to your doctor about the specific needs of you and your family. Here is a list of flu shots and CDC-recommended routine vaccines.

Age restrictions or limitations may apply. Check with your network pharmacy for requirements.

### Flu shots

#### Flu (Influenza)<sup>2</sup>

Afluria Quad	Flublok Quad	FluMist Quad
Fluad Quad	Flucelvax Quad	Fluzone High-Dose Quad
Fluarix Quad	Flulaval Quad	Fluzone Quad

### Other vaccines<sup>2</sup>

**COVID-19** – Age edits per ACIP recommendations apply.

#### Hepatitis A

Havrix, Vaqta

#### Hepatitis B

Engerix-B, Heplisav-B, PreHevbrio, Recombivax HB

**Human Papilloma Virus (HPV)** – Vaccine prevents HPV-related cancers (ages 9-26 years)

Gardasil 9

#### Measles, Mumps, Rubella

M-M-R II

**Meningococcal** – Vaccine prevents meningitis Groups A, C, Y and W-135

Menactra, Menquadfi, Menveo

**Meningococcal** – Vaccine prevents meningitis Group B

Bexsero, Trumenba

**Pneumococcal** – Vaccine prevents pneumonia

Pevnar 13, Pneumovax 23, Vaxneuvance, Pevnar 20

**Tdap** – Vaccine prevents tetanus, diphtheria, pertussis

Adacel, Boostrix

**Td** – Vaccine prevents tetanus and diphtheria

TDVax, Tenivac

**Varicella** – Vaccine prevents chicken pox

Varivax

**Zoster** – Vaccine prevents shingles

Shingrix

Please note this list is subject to change. Ask your employer or check your plan documents for your plan's specific details.

Not all vaccines on this list are available at all network pharmacies. Contact your local network pharmacy to confirm which vaccines they offer.

<sup>1</sup> Centers for Disease Control and Prevention. Influenza. [cdc.gov/flu/](https://www.cdc.gov/flu/). Last reviewed November 18, 2021. Accessed July 29, 2022.

<sup>2</sup> 2023 Recommended vaccinations for children and adults. [cdc.gov/vaccines](https://www.cdc.gov/vaccines/). Accessed May 17, 2023.

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# Kaiser High HMO

**Disclosure Form Part One**

230290 CharterLIFE  
 Home Region: Southern California  
 1/1/24 through 12/31/24

**Principal benefits for Kaiser Permanente Traditional HMO Plan**

**Accumulation Period**

The Accumulation Period for this plan is January 1 through December 31.

**Out-of-Pocket Maximums and Deductibles**

For Services that apply to the Plan Out-of-Pocket Maximum, you will not pay any more Cost Share for the rest of the Accumulation Period once you have reached the amounts listed below.

<b>Amounts Per Accumulation Period</b>	<b>Self-Only Coverage</b> (a Family of one Member)	<b>Family Coverage</b> Each Member in a Family of two or more Members	<b>Family Coverage</b> Entire Family of two or more Members
Plan Out-of-Pocket Maximum	\$1,500	\$1,500	\$3,000
Plan Deductible	None	None	None
Drug Deductible	None	None	None

**Plan Provider Office Visits**

	<b>You Pay</b>
Most Primary Care Visits and most Non-Physician Specialist Visits.....	\$10 per visit
Most Physician Specialist Visits .....	\$10 per visit
Routine physical maintenance exams, including well-woman exams ....	No charge
Well-child preventive exams (through age 23 months) .....	No charge
Scheduled prenatal care exams.....	No charge
Routine eye exams with a Plan Optometrist .....	No charge
Urgent care consultations, evaluations, and treatment .....	\$10 per visit
Most physical, occupational, and speech therapy.....	\$10 per visit

**Telehealth Visits**

	<b>You Pay</b>
Primary Care Visits and Non-Physician Specialist Visits by interactive video .....	No charge
Physician Specialist Visits by interactive video .....	No charge
Primary Care Visits and Non-Physician Specialist Visits by telephone..	No charge
Physician Specialist Visits by telephone .....	No charge

**Outpatient Services**

	<b>You Pay</b>
Outpatient surgery and certain other outpatient procedures .....	\$10 per procedure
Most immunizations (including the vaccine).....	No charge
Most X-rays and laboratory tests.....	No charge

**Hospital Inpatient Services**

	<b>You Pay</b>
Room and board, surgery, anesthesia, X-rays, laboratory tests, and drugs .....	No charge

**Emergency Services**

	<b>You Pay</b>
Emergency department visits .....	\$150 per visit
Note: If you are admitted directly to the hospital as an inpatient for covered Services, you will pay the inpatient Cost Share instead of the emergency department Cost Share (see "Hospital Inpatient Services" for inpatient Cost Share)	

**Ambulance Services**

	<b>You Pay</b>
Ambulance Services.....	No charge

**Prescription Drug Coverage**

	<b>You Pay</b>
Covered outpatient items in accord with our drug formulary guidelines:	
Most generic items (Tier 1) at a Plan Pharmacy .....	\$10 for up to a 30-day supply
Most generic (Tier 1) refills through our mail-order service .....	\$20 for up to a 100-day supply
Most brand-name items (Tier 2) at a Plan Pharmacy.....	\$25 for up to a 30-day supply
Most brand-name (Tier 2) refills through our mail-order service .....	\$50 for up to a 100-day supply
Most specialty items (Tier 4) at a Plan Pharmacy .....	20% Coinsurance (not to exceed \$150) for up to a 30-day supply

**Durable Medical Equipment (DME)**

	<b>You Pay</b>
DME items as described in the EOC.....	No charge

**Mental Health Services**

	<b>You Pay</b>
Inpatient psychiatric hospitalization.....	No charge

(continues)



**Disclosure Form Part One**

(continued)

<b>Mental Health Services</b>	<b>You Pay</b>
Individual outpatient mental health evaluation and treatment .....	\$10 per visit
Group outpatient mental health treatment.....	\$5 per visit
<b>Substance Use Disorder Treatment</b>	<b>You Pay</b>
Inpatient detoxification.....	No charge
Individual outpatient substance use disorder evaluation and treatment	\$10 per visit
Group outpatient substance use disorder treatment .....	\$5 per visit
<b>Home Health Services</b>	<b>You Pay</b>
Home health care (up to 100 visits per Accumulation Period) .....	No charge
<b>Other</b>	<b>You Pay</b>
Skilled nursing facility care (up to 100 days per benefit period).....	No charge
Prosthetic and orthotic devices as described in the <i>EOC</i> .....	No charge
Diagnosis and treatment of infertility and artificial insemination (such as outpatient procedures or laboratory tests) as described in the <i>EOC</i> .....	50% Coinsurance
Assisted reproductive technology (“ART”) Services.....	Not covered
Hospice care .....	No charge

This is a summary of the most frequently asked-about benefits. This chart does not explain benefits, Cost Share, out-of-pocket maximums, exclusions, or limitations, nor does it list all benefits and Cost Share amounts. For a complete explanation, please refer to the *EOC*. Please note that we provide all benefits required by law (for example, diabetes testing supplies).



# Kaiser Low HMO

**Disclosure Form Part One**

230290 CharterLIFE  
 Home Region: Southern California  
 1/1/24 through 12/31/24

**Principal benefits for Kaiser Permanente Traditional HMO Plan**

**Accumulation Period**

The Accumulation Period for this plan is January 1 through December 31.

**Out-of-Pocket Maximums and Deductibles**

For Services that apply to the Plan Out-of-Pocket Maximum, you will not pay any more Cost Share for the rest of the Accumulation Period once you have reached the amounts listed below.

<b>Amounts Per Accumulation Period</b>	<b>Self-Only Coverage</b> (a Family of one Member)	<b>Family Coverage</b> Each Member in a Family of two or more Members	<b>Family Coverage</b> Entire Family of two or more Members
Plan Out-of-Pocket Maximum	\$1,500	\$1,500	\$3,000
Plan Deductible	None	None	None
Drug Deductible	None	None	None

**Plan Provider Office Visits**

	<b>You Pay</b>
Most Primary Care Visits and most Non-Physician Specialist Visits.....	\$20 per visit
Most Physician Specialist Visits .....	\$20 per visit
Routine physical maintenance exams, including well-woman exams ....	No charge
Well-child preventive exams (through age 23 months) .....	No charge
Scheduled prenatal care exams.....	No charge
Routine eye exams with a Plan Optometrist .....	No charge
Urgent care consultations, evaluations, and treatment .....	\$20 per visit
Most physical, occupational, and speech therapy.....	\$20 per visit

**Telehealth Visits**

	<b>You Pay</b>
Primary Care Visits and Non-Physician Specialist Visits by interactive video .....	No charge
Physician Specialist Visits by interactive video .....	No charge
Primary Care Visits and Non-Physician Specialist Visits by telephone..	No charge
Physician Specialist Visits by telephone .....	No charge

**Outpatient Services**

	<b>You Pay</b>
Outpatient surgery and certain other outpatient procedures .....	\$20 per procedure
Most immunizations (including the vaccine).....	No charge
Most X-rays and laboratory tests.....	No charge

**Hospital Inpatient Services**

	<b>You Pay</b>
Room and board, surgery, anesthesia, X-rays, laboratory tests, and drugs .....	\$250 per admission

**Emergency Services**

	<b>You Pay</b>
Emergency department visits .....	\$150 per visit
Note: If you are admitted directly to the hospital as an inpatient for covered Services, you will pay the inpatient Cost Share instead of the emergency department Cost Share (see "Hospital Inpatient Services" for inpatient Cost Share)	

**Ambulance Services**

	<b>You Pay</b>
Ambulance Services.....	\$50 per trip

**Prescription Drug Coverage**

	<b>You Pay</b>
Covered outpatient items in accord with our drug formulary guidelines:	
Most generic items (Tier 1) at a Plan Pharmacy .....	\$15 for up to a 30-day supply
Most generic (Tier 1) refills through our mail-order service .....	\$30 for up to a 100-day supply
Most brand-name items (Tier 2) at a Plan Pharmacy.....	\$30 for up to a 30-day supply
Most brand-name (Tier 2) refills through our mail-order service .....	\$60 for up to a 100-day supply
Most specialty items (Tier 4) at a Plan Pharmacy .....	20% Coinsurance (not to exceed \$200) for up to a 30-day supply

**Durable Medical Equipment (DME)**

	<b>You Pay</b>
DME items as described in the EOC.....	No charge

**Mental Health Services**

	<b>You Pay</b>
Inpatient psychiatric hospitalization.....	\$250 per admission

(continues)

**Disclosure Form Part One**

(continued)

<b>Mental Health Services</b>	<b>You Pay</b>
Individual outpatient mental health evaluation and treatment .....	\$20 per visit
Group outpatient mental health treatment.....	\$10 per visit
<b>Substance Use Disorder Treatment</b>	<b>You Pay</b>
Inpatient detoxification.....	\$250 per admission
Individual outpatient substance use disorder evaluation and treatment	\$20 per visit
Group outpatient substance use disorder treatment .....	\$5 per visit
<b>Home Health Services</b>	<b>You Pay</b>
Home health care (up to 100 visits per Accumulation Period) .....	No charge
<b>Other</b>	<b>You Pay</b>
Skilled nursing facility care (up to 100 days per benefit period).....	No charge
Prosthetic and orthotic devices as described in the <i>EOC</i> .....	No charge
Diagnosis and treatment of infertility and artificial insemination (such as outpatient procedures or laboratory tests) as described in the <i>EOC</i> .....	50% Coinsurance
Assisted reproductive technology (“ART”) Services.....	Not covered
Hospice care .....	No charge

This is a summary of the most frequently asked-about benefits. This chart does not explain benefits, Cost Share, out-of-pocket maximums, exclusions, or limitations, nor does it list all benefits and Cost Share amounts. For a complete explanation, please refer to the *EOC*. Please note that we provide all benefits required by law (for example, diabetes testing supplies).



# Kaiser

# \$1500 HMO

**Disclosure Form Part One**

230290 CharterLIFE  
 Home Region: Southern California  
 1/1/24 through 12/31/24

**Principal benefits for Kaiser Permanente Deductible HMO Plan**

**Accumulation Period**

The Accumulation Period for this plan is January 1 through December 31.

**Out-of-Pocket Maximums and Deductibles**

For Services that apply to the Plan Out-of-Pocket Maximum, you will not pay any more Cost Share for the rest of the Accumulation Period once you have reached the amounts listed below.

For Services that are subject to the Plan Deductible or the Drug Deductible, you must pay Charges for covered Services you receive during the Accumulation Period until you reach the deductible amounts listed below. All payments you make toward your deductibles apply to the Plan Out-of-Pocket Maximum amounts listed below.

Amounts Per Accumulation Period	Self-Only Coverage (a Family of one Member)	Family Coverage Each Member in a Family of two or more Members	Family Coverage Entire Family of two or more Members
Plan Out-of-Pocket Maximum	\$4,000	\$4,000	\$8,000
Plan Deductible	\$1,500	\$1,500	\$3,000
Drug Deductible	None	None	None

**Plan Provider Office Visits**

	You Pay
Most Primary Care Visits and most Non-Physician Specialist Visits.....	\$20 per visit (Plan Deductible doesn't apply)
Most Physician Specialist Visits .....	\$20 per visit (Plan Deductible doesn't apply)
Routine physical maintenance exams, including well-woman exams....	No charge (Plan Deductible doesn't apply)
Well-child preventive exams (through age 23 months) .....	No charge (Plan Deductible doesn't apply)
Scheduled prenatal care exams.....	No charge (Plan Deductible doesn't apply)
Routine eye exams with a Plan Optometrist .....	No charge (Plan Deductible doesn't apply)
Urgent care consultations, evaluations, and treatment .....	\$20 per visit (Plan Deductible doesn't apply)
Most physical, occupational, and speech therapy.....	\$20 per visit (Plan Deductible doesn't apply)

**Telehealth Visits**

	You Pay
Primary Care Visits and Non-Physician Specialist Visits by interactive video.....	No charge (Plan Deductible doesn't apply)
Physician Specialist Visits by interactive video .....	No charge (Plan Deductible doesn't apply)
Primary Care Visits and Non-Physician Specialist Visits by telephone..	No charge (Plan Deductible doesn't apply)
Physician Specialist Visits by telephone .....	No charge (Plan Deductible doesn't apply)

**Outpatient Services**

	You Pay
Outpatient surgery and certain other outpatient procedures.....	20% Coinsurance after Plan Deductible
Most immunizations (including the vaccine).....	No charge (Plan Deductible doesn't apply)
Most X-rays and laboratory tests.....	\$10 per encounter (Plan Deductible doesn't apply)
Preventive X-rays, screenings, and laboratory tests as described in the EOC .....	No charge (Plan Deductible doesn't apply)
MRI, most CT, and PET scans.....	20% Coinsurance up to a maximum of \$50 per procedure (Plan Deductible doesn't apply)

**Hospital Inpatient Services**

	You Pay
Room and board, surgery, anesthesia, X-rays, laboratory tests, and drugs .....	20% Coinsurance after Plan Deductible

**Emergency Services**

	You Pay
Emergency department visits .....	20% Coinsurance after Plan Deductible

Note: If you are admitted directly to the hospital as an inpatient for covered Services, you will pay the inpatient Cost Share instead of the emergency department Cost Share (see "Hospital Inpatient Services" for inpatient Cost Share)

**Ambulance Services**

	You Pay
Ambulance Services.....	\$150 per trip (Plan Deductible doesn't apply)

**Prescription Drug Coverage**

	You Pay
Covered outpatient items in accord with our drug formulary guidelines:	
Most generic items (Tier 1) at a Plan Pharmacy .....	\$10 for up to a 30-day supply (Plan Deductible doesn't apply)
Most generic (Tier 1) refills through our mail-order service.....	\$20 for up to a 100-day supply (Plan Deductible doesn't apply)

(continues)

**Disclosure Form Part One**

(continued)

**Prescription Drug Coverage**

**You Pay**

Most brand-name items (Tier 2) at a Plan Pharmacy.....	\$30 for up to a 30-day supply (Plan Deductible doesn't apply)
Most brand-name (Tier 2) refills through our mail-order service .....	\$60 for up to a 100-day supply (Plan Deductible doesn't apply)
Most specialty items (Tier 4) at a Plan Pharmacy .....	20% Coinsurance (not to exceed \$150) for up to a 30-day supply (Plan Deductible doesn't apply)

**Durable Medical Equipment (DME)**

**You Pay**

DME items as described in the <i>EOC</i> .....	20% Coinsurance (Plan Deductible doesn't apply)
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**Mental Health Services**

**You Pay**

Inpatient psychiatric hospitalization.....	20% Coinsurance after Plan Deductible
Individual outpatient mental health evaluation and treatment .....	\$20 per visit (Plan Deductible doesn't apply)
Group outpatient mental health treatment.....	\$10 per visit (Plan Deductible doesn't apply)

**Substance Use Disorder Treatment**

**You Pay**

Inpatient detoxification.....	20% Coinsurance after Plan Deductible
Individual outpatient substance use disorder evaluation and treatment .....	\$20 per visit (Plan Deductible doesn't apply)
Group outpatient substance use disorder treatment .....	\$5 per visit (Plan Deductible doesn't apply)

**Home Health Services**

**You Pay**

Home health care (up to 100 visits per Accumulation Period) .....	No charge (Plan Deductible doesn't apply)
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**Other**

**You Pay**

Skilled nursing facility care (up to 100 days per benefit period).....	20% Coinsurance (Plan Deductible doesn't apply)
Prosthetic and orthotic devices as described in the <i>EOC</i> .....	No charge (Plan Deductible doesn't apply)
Diagnosis and treatment of infertility and artificial insemination (such as outpatient procedures or laboratory tests) as described in the <i>EOC</i> .....	50% Coinsurance (Plan Deductible doesn't apply)
Assisted reproductive technology ("ART") Services.....	Not covered
Hospice care .....	No charge (Plan Deductible doesn't apply)

This is a summary of the most frequently asked-about benefits. This chart does not explain benefits, Cost Share, out-of-pocket maximums, exclusions, or limitations, nor does it list all benefits and Cost Share amounts. For a complete explanation, please refer to the *EOC*. Please note that we provide all benefits required by law (for example, diabetes testing supplies).



Kaiser  
HRA  
\$3000



**Disclosure Form Part One**

230290 CharterLIFE  
 Home Region: Southern California  
 1/1/24 through 12/31/24

**Principal benefits for Kaiser Permanente Deductible HMO Plan**

**Accumulation Period**

The Accumulation Period for this plan is January 1 through December 31.

**Out-of-Pocket Maximums and Deductibles**

For Services that apply to the Plan Out-of-Pocket Maximum, you will not pay any more Cost Share for the rest of the Accumulation Period once you have reached the amounts listed below.

For Services that are subject to the Plan Deductible or the Drug Deductible, you must pay Charges for covered Services you receive during the Accumulation Period until you reach the deductible amounts listed below. All payments you make toward your deductibles apply to the Plan Out-of-Pocket Maximum amounts listed below.

Amounts Per Accumulation Period	Self-Only Coverage (a Family of one Member)	Family Coverage Each Member in a Family of two or more Members	Family Coverage Entire Family of two or more Members
Plan Out-of-Pocket Maximum	\$6,000	\$6,000	\$12,000
Plan Deductible	\$3,000	\$3,000	\$6,000
Drug Deductible	None	None	None

**Plan Provider Office Visits**

Most Primary Care Visits and most Non-Physician Specialist Visits.....  
 Most Physician Specialist Visits .....  
 Routine physical maintenance exams, including well-woman exams ....  
 Well-child preventive exams (through age 23 months) .....  
 Scheduled prenatal care exams.....  
 Routine eye exams with a Plan Optometrist .....  
 Urgent care consultations, evaluations, and treatment .....  
 Most physical, occupational, and speech therapy.....

**You Pay**

20% Coinsurance after Plan Deductible  
 20% Coinsurance after Plan Deductible  
 No charge (Plan Deductible doesn't apply)  
 No charge (Plan Deductible doesn't apply)  
 No charge (Plan Deductible doesn't apply)  
 No charge (Plan Deductible doesn't apply)  
 20% Coinsurance after Plan Deductible  
 20% Coinsurance after Plan Deductible

**Telehealth Visits**

Primary Care Visits and Non-Physician Specialist Visits by interactive video.....  
 Physician Specialist Visits by interactive video .....  
 Primary Care Visits and Non-Physician Specialist Visits by telephone..  
 Physician Specialist Visits by telephone .....

**You Pay**

No charge (Plan Deductible doesn't apply)  
 No charge (Plan Deductible doesn't apply)  
 No charge (Plan Deductible doesn't apply)  
 No charge (Plan Deductible doesn't apply)

**Outpatient Services**

Outpatient surgery and certain other outpatient procedures.....  
 Most immunizations (including the vaccine).....  
 Most X-rays and laboratory tests.....  
 Preventive X-rays, screenings, and laboratory tests as described in the EOC .....

**You Pay**

20% Coinsurance after Plan Deductible  
 No charge (Plan Deductible doesn't apply)  
 20% Coinsurance after Plan Deductible  
 No charge (Plan Deductible doesn't apply)

**Hospital Inpatient Services**

Room and board, surgery, anesthesia, X-rays, laboratory tests, and drugs.....

**You Pay**

20% Coinsurance after Plan Deductible

**Emergency Services**

Emergency department visits.....

**You Pay**

20% Coinsurance after Plan Deductible

Note: If you are admitted directly to the hospital as an inpatient for covered Services, you will pay the inpatient Cost Share instead of the emergency department Cost Share (see "Hospital Inpatient Services" for inpatient Cost Share)

**Ambulance Services**

Ambulance Services.....

**You Pay**

20% Coinsurance after Plan Deductible

**Prescription Drug Coverage**

Covered outpatient items in accord with our drug formulary guidelines:

**You Pay**

Most generic items (Tier 1) at a Plan Pharmacy or through our mail-order service..... 20% Coinsurance (not to exceed \$50) for up to a 100-day supply (Plan Deductible doesn't apply)  
 Most brand-name items (Tier 2) at a Plan Pharmacy or through our mail-order service..... 20% Coinsurance (not to exceed \$100) for up to a 100-day supply (Plan Deductible doesn't apply)  
 Most specialty items (Tier 4) at a Plan Pharmacy..... 20% Coinsurance (not to exceed \$200) for up to a 30-day supply (Plan Deductible doesn't apply)

(continues)

**Disclosure Form Part One**

(continued)

**Durable Medical Equipment (DME)**

**You Pay**

DME items as described in the *EOC* ..... 20% Coinsurance (Plan Deductible doesn't apply)

**Mental Health Services**

**You Pay**

Inpatient psychiatric hospitalization ..... 20% Coinsurance after Plan Deductible  
 Individual outpatient mental health evaluation and treatment ..... 20% Coinsurance after Plan Deductible  
 Group outpatient mental health treatment ..... 20% Coinsurance after Plan Deductible

**Substance Use Disorder Treatment**

**You Pay**

Inpatient detoxification ..... 20% Coinsurance after Plan Deductible  
 Individual outpatient substance use disorder evaluation and treatment ..... 20% Coinsurance after Plan Deductible  
 Group outpatient substance use disorder treatment ..... 20% Coinsurance after Plan Deductible

**Home Health Services**

**You Pay**

Home health care (up to 100 visits per Accumulation Period) ..... No charge (Plan Deductible doesn't apply)

**Other**

**You Pay**

Skilled nursing facility care (up to 100 days per benefit period) ..... 20% Coinsurance after Plan Deductible  
 Prosthetic and orthotic devices as described in the *EOC* ..... No charge (Plan Deductible doesn't apply)  
 Diagnosis and treatment of infertility and artificial insemination (such as outpatient procedures or laboratory tests) as described in the *EOC* ..... 50% Coinsurance (Plan Deductible doesn't apply)  
 Assisted reproductive technology ("ART") Services ..... Not covered  
 Hospice care ..... No charge (Plan Deductible doesn't apply)

This is a summary of the most frequently asked-about benefits. This chart does not explain benefits, Cost Share, out-of-pocket maximums, exclusions, or limitations, nor does it list all benefits and Cost Share amounts. For a complete explanation, please refer to the *EOC*. Please note that we provide all benefits required by law (for example, diabetes testing supplies).

Provided by American Specialty Health Plans of California, Inc. (ASH Plans)

# Your Kaiser Permanente **CHIROPRACTIC** benefits

## When you need chiropractic care, follow these simple steps:

1. Find an ASH Participating Provider near you:
  - Go to [ashlink.com/ash/kp](https://ashlink.com/ash/kp), or
  - Call **1-800-678-9133** (TTY **711**), Monday through Friday, from 5 a.m. to 6 p.m. Pacific time
2. Schedule an appointment.
3. Pay for your office visit when you arrive for your appointment.

(See the reverse for more details.)

# YOUR KAISER PERMANENTE CHIROPRACTIC BENEFIT

Office Visits	Cost Sharing and Visit Limits
<p>Covered Services are limited to Medically Necessary Chiropractic Services authorized and provided by ASH Participating Providers except for the initial examination, Emergency Chiropractic Services, Urgent Chiropractic Services, and Services that are not available from ASH Participating Providers or other licensed providers with which ASH contracts to provide covered care. You can obtain an initial examination from any ASH Participating Provider without a referral from a Kaiser Permanente Plan Physician. Each office visit counts toward any visit limit, if applicable.</p>	<p><b>Office visit cost share:</b> \$15 copayment per visit (if your <i>Amendment</i> is paired with an HDHP HMO evidence of coverage, this cost share is subject to the Plan Deductible described in your <i>EOC</i>)</p> <p><b>Office visit limit:</b> 30 visits per year</p> <p><b>Chiropractic supports and appliances:</b> If the amount of the appliance in the ASH Plans fee schedule exceeds \$50, you will pay the amount in excess of \$50. Covered chiropractic appliances are limited to: elbow supports, back supports, cervical collars, cervical pillows, heel lifts, hot or cold packs, lumbar braces and supports, lumbar cushions, orthotics, wrist supports, rib belts, home traction units, ankle braces, knee braces, rib supports, and wrist braces.</p>

**X-rays and laboratory tests:** Medically Necessary X-rays and laboratory tests are covered at no charge when prescribed as part of covered chiropractic care and an ASH Participating Provider provides the Services or refers you to another licensed provider with which ASH contracts for the Services. If your *Amendment* is paired with an HDHP HMO evidence of coverage, this cost share is subject to the Plan Deductible described in your *EOC*.

## ASH Participating Providers

ASH Plans contracts with ASH Participating Providers and other licensed providers to provide covered Chiropractic Services. You must receive these services from an ASH Participating Provider or another licensed provider with which ASH contracts, except for Emergency Chiropractic Services, Urgent Chiropractic Services, and Services that are not available from contracted providers that are authorized in advance by ASH Plans. The list of ASH Participating Providers is available on the ASH Plans website at [ashlink.com/ash/kaisercamedicare](http://ashlink.com/ash/kaisercamedicare) for Kaiser Permanente Senior Advantage members, or [ashlink.com/ash/kp](http://ashlink.com/ash/kp) for all other members, or from the ASH Plans Customer Service Department toll free at **1-800-678-9133 (TTY 711)**. The list of ASH Participating Providers is subject to change at any time without notice.

## How to obtain services

To obtain covered Services, call an ASH Participating Provider to schedule an initial examination. If additional Services are required, verification that the Services are Medically Necessary may be required. Your ASH Participating Provider will request any medical necessity determinations. An ASH Plans clinician in the same or similar specialty as the provider of Services under review will decide whether the Services are or were Medically Necessary. ASH Plans will disclose to you, upon request, the written criteria it uses to make the decision to authorize, modify, delay, or deny a request for authorization. If you have questions or concerns, please contact the ASH Plans Customer Service Department.

## Second Opinions

You may request a second opinion in regard to covered Services by contacting another ASH Participating Provider. An ASH Participating Provider may also request a second opinion in regard to covered Services by referring you to another ASH Participating Provider in the same or similar specialty.

## Your costs

When you receive covered Chiropractic Services, you must pay the cost share described below. The cost share does not apply toward the Plan Deductible or Plan Out-of-Pocket Maximum described in your Health Plan *Evidence of Coverage* (“*EOC*”), unless your *Chiropractic Services Amendment* (“*Amendment*”) is amending an HSA-Qualified High Deductible Health Plan (HDHP) HMO plan evidence of coverage. If your *Amendment* is paired with an HDHP HMO evidence of coverage, the cost share you pay for covered Services is subject to the Plan Deductible and Plan Out-of-Pocket Maximum described in your *EOC*.

## Emergency and Urgent Chiropractic Services

We cover Emergency Chiropractic Services and Urgent Chiropractic Services provided by both ASH Participating Providers and Non-Participating Providers. We do not cover follow-up or continuing care from a Non-Participating Provider unless ASH Plans has authorized the services in advance. Also, we do not cover services from a Non-Participating Provider that ASH Plans determines are not Emergency Chiropractic Services or Urgent Chiropractic Services.

## Getting Assistance

If you have a question or concern regarding the Services you received from an ASH Participating Provider or another licensed provider with which ASH Plans contracts, you may call the ASH Plans Customer Service Department toll free at **1-800-678-9133 (TTY 711)**, weekdays from 5 a.m. to 6 p.m. Pacific time.

## Grievances

You can file a grievance with Kaiser Permanente regarding any issue. Your grievance must explain your issue, such as the reasons why you believe a decision was in error or why you are dissatisfied with Services you received. You may submit your grievance orally or in writing to Kaiser Permanente as described in your Health Plan *EOC*.

## Exclusions

- Services provided by a chiropractor that are not within the scope of licensure for a chiropractor licensed in California
- Adjunctive therapy not associated with spinal, muscle, or joint manipulations
- Air conditioners, air purifiers, therapeutic mattresses, chiropractic appliances, durable medical equipment, supplies, devices, appliances, and any other item except those listed as covered in your *Amendment*
- Services for asthma or addiction, such as nicotine addiction
- Hypnotherapy, behavior training, sleep therapy, and weight programs
- Thermography
- Experimental or investigational Services
- CT scans, MRIs, PET scans, bone scans, nuclear medicine, and any other type of diagnostic imaging or radiology other than X-rays covered under the “Covered Services” section of your *Amendment*
- Ambulance and other transportation
- Education programs, non-medical self-care or self-help, any self-help physical exercise training, and any related diagnostic testing
- Services for pre-employment physicals or vocational rehabilitation
- Drugs and medicines, including non-legend or proprietary drugs and medicines
- Services you receive outside the state of California except for Emergency Chiropractic Services and Urgent Chiropractic Services
- Hospital services, anesthesia, manipulation under anesthesia, and related services
- Dietary and nutritional supplements, such as vitamins, minerals, herbs, herbal products, injectable supplements, and similar products
- Massage therapy
- Maintenance care (services provided to members whose treatment records indicate that they have reached maximum therapeutic benefit)

**Definitions**

**ASH Participating Provider:** A chiropractor who is licensed to provide chiropractic services in California and who has a contract with ASH Plans to provide Medically Necessary Chiropractic Services to you.

**ASH Plans:** American Specialty Health Plans of California, Inc., a California corporation.

**Chiropractic Services:** Chiropractic services include spinal and extremity manipulation and adjunctive therapies such as ultrasound, therapeutic exercise, or electrical muscle stimulation, when provided during the same course of treatment and in conjunction with chiropractic manipulative services, and other services provided or prescribed by a chiropractor (including laboratory tests, X-rays, and chiropractic supports and appliances) for the treatment of your Musculoskeletal and Related Disorder.

**Emergency Chiropractic Services:** Covered Chiropractic Services provided for the treatment of a Musculoskeletal and Related Disorder which manifests itself by acute symptoms of sufficient severity (including severe pain) such that you could expect the absence of immediate Chiropractic Services to result in serious jeopardy to your health or body functions or organs.

**Medically Necessary:** A Service is Medically Necessary if it is medically appropriate and required to prevent, diagnose, or treat your condition or clinical symptoms in accord with generally accepted professional standards of practice that are consistent with a standard of care in the medical community.

**Musculoskeletal and Related Disorders:** Conditions with signs and symptoms related to the nervous, muscular, and/or skeletal systems. Musculoskeletal and Related Disorders are conditions typically categorized as structural, degenerative, or inflammatory disorders; or biomechanical dysfunction of the joints of the body and/or related components of the muscle or skeletal systems (muscles, tendons, fascia, nerves, ligaments/capsules, discs, and synovial structures), and related manifestations or conditions.

**Non-Participating Provider:** A provider other than an ASH Participating Provider.

**Services:** Health care services or items.

**Urgent Chiropractic Services:** Chiropractic Services that meet all of the following requirements:

- They are necessary to prevent serious deterioration of your health, resulting from an unforeseen illness, injury, or complication of an existing condition, including pregnancy.
- They cannot be delayed until you return to the Service Area.

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This is a summary and is intended to highlight only the most frequently asked questions about the chiropractic benefit, including cost share. Please refer to the *Amendment* for a detailed description of the chiropractic coverage.

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# Language Assistance Services

**English:** Language assistance is available at no cost to you, 24 hours a day, 7 days a week. You can request interpreter services, materials translated into your language, or in alternative formats. Just call us at **1-800-464-4000**, 24 hours a day, 7 days a week (closed holidays). TTY users call **711**.

**Arabic:** خدمات الترجمة الفورية متوفرة لك مجاناً على مدار الساعة كافة أيام الأسبوع. بإمكانك طلب خدمة الترجمة الفورية أو ترجمة وثائق للغتك أو لصيغ أخرى. ما عليك سوى الاتصال بنا على الرقم **1-800-464-4000** على مدار الساعة كافة أيام الأسبوع (مغلق أيام العطلات). لمستخدمي خدمة الهاتف النصي يرجى الاتصال على الرقم (711).

**Armenian:** Ձեզ կարող է անվճար օգնություն տրամադրվել լեզվի հարցում՝ օրը 24 ժամ, շաբաթը 7 օր: Դուք կարող եք պահանջել բանավոր թարգմանչի ծառայություններ, Ձեր լեզվով թարգմանված կամ այլընտրանքային ձևաչափով պատրաստված նյութեր: Պարզապես զանգահարեք մեզ՝ **1-800-464-4000** հեռախոսահամարով՝ օրը 24 ժամ՝ շաբաթը 7 օր (տոն օրերին փակ է): TTY-ից օգտվողները պետք է զանգահարեն **711**:

**Chinese:** 您每週 7 天，每天 24 小時均可獲得免費語言協助。您可以申請口譯服務、要求將資料翻譯成您所用語言或轉換為其他格式。我們每週 7 天，每天 24 小時均歡迎您打電話 **1-800-757-7585** 前來聯絡（節假日休息）。聽障及語障專線 (TTY) 使用者請撥 **711**。

**Farsi:** خدمات زبانی در 24 ساعت شبانروز و 7 روز هفته بدون اخذ هزینه در اختیار شما است. شما می توانید برای خدمات مترجم شفاهی، ترجمه جزوات به زبان شما و یا به صورتهای دیگر درخواست کنید. کفایت در 24 ساعت شبانروز و 7 روز هفته (به استثنای روزهای تعطیل) با ما به شماره **1-800-464-4000** تماس بگیرید. کاربران TTY با شماره **711** تماس بگیرند.

**Hindi:** बिना किसी लागत के दुभाषिया सेवाएँ, दिन के 24 घंटे, सप्ताह के सातों दिन उपलब्ध हैं। आप एक दुभाषिये की सेवाओं के लिए, बिना किसी लागत के सामग्रियों को अपनी भाषा में अनुवाद करवाने के लिए, या वैकल्पिक प्रारूपों के लिए अनुरोध कर सकते हैं। बस केवल हमें **1-800-464-4000** पर, दिन के 24 घंटे, सप्ताह के सातों दिन (छुट्टियों वाले दिन बंद रहता है) कॉल करें। TTY उपयोगकर्ता **711** पर कॉल करें।

**Hmong:** Muajkwc pab txhais lus pub dawb rau koj, 24 teev ib hnuv twg, 7 hnuv ib lim tiam twg. Koj thov tau cov kev pab txhais lus, muab cov ntaub ntauv txhais ua koj hom lus, los yog ua lwm hom. Tsuas hu rau **1-800-464-4000**, 24 teev ib hnuv twg, 7 hnuv ib lim tiam twg (cov hnuv caiv kaw). Cov neeg siv TTY hu **711**.

**Japanese:** 当院では、言語支援を無料で、年中無休、終日ご利用いただけます。通訳サービス、日本語に翻訳された資料、あるいは資料を別の書式でも依頼できます。お気軽に **1-800-464-4000** までお電話ください（祭日を除き年中無休）。TTY ユーザーは **711** にお電話ください。

**Khmer:** ជំនួយភាសា គឺមានឥតអស់ថ្លៃដល់អ្នកឡើយ 24 ម៉ោងមួយថ្ងៃ 7 ថ្ងៃមួយអាទិត្យ។ អ្នកអាចស្នើសុំសេវាអ្នកបកប្រែសំភារៈដែលបានបកប្រែទៅជាភាសាខ្មែរ ឬជាទម្រង់ផ្សេងទៀត។ គ្រាន់តែទូរស័ព្ទមកយើង តាមលេខ **1-800-464-4000** បាន 24 ម៉ោងមួយថ្ងៃ 7 ថ្ងៃមួយអាទិត្យ (បិទថ្ងៃបុណ្យ)។ អ្នកប្រើ TTY ហៅលេខ **711**។

**Korean:** 요일 및 시간에 관계없이 언어 지원 서비스를 무료로 이용하실 수 있습니다. 귀하는 통역 서비스, 귀하의 언어로 번역된 자료 또는 대체 형식의 자료를 요청할 수 있습니다. 요일 및 시간에 관계없이 **1-800-464-4000** 번으로 전화하십시오 (공휴일 휴무). TTY 사용자 번호 **711**.

**Laotian:** ການຊ່ວຍເຫຼືອດ້ານພາສາມີໃຫ້ໂດຍບໍ່ເສັງຄ່າ ແກ່ທ່ານ, ຕະຫຼອດ 24 ຊົ່ວໂມງ, 7 ວັນຕໍ່ອາທິດ. ທ່ານສາມາດຮ້ອງຂໍຮັບບໍລິການນາຍພາສາ, ໃຫ້ແປເອກອໍສານເປັນພາສາຂອງທ່ານ, ຫຼື ໃນຮູບແບບອື່ນ. ພຽງແຕ່ໂທອາທິດເຮົາທີ່ **1-800-464-4000**, ຕະຫຼອດ 24 ຊົ່ວໂມງ, 7 ວັນຕໍ່ອາທິດ (ປິດວັນພັກຕ່າງໆ). ຜູ້ໃຊ້ສາຍ TTY ໂທ **711**.



**Navajo:** Saad bee áká'a'ayeed náhóló t'áá jiiik'é, naadiin doo bibaa' dji' ahéé'iikeed tsosts'id yiskáají damoo ná'ádleejji. Atah halne'é áká'adoolwołígíí jókí, t'áadoo le'é t'áá hóhazaadji hadilyaa'go, éí doodaii' nááná lá a'aa'ádaat'ehígíí bee hádadilyaa'go. Kojí hodiilnih **1-800-464-4000**, naadiin doo bibaa' dji' ahéé'iikeed tsosts'id yiskáají damoo ná'ádleejji (Dahodiyin biniiyé e'e'aahgo éí da'deelkaal). TTY chodeeyoolnigíí kojí hodiilnih **711**.

**Punjabi:** ਬਿਨਾਂ ਕਿਸੀ ਲਾਗਤ ਦੇ, ਦਿਨ ਦੇ 24 ਘੰਟੇ, ਹਫ਼ਤੇ ਦੇ 7 ਦਿਨ, ਦੁਭਾਸ਼ੀਆ ਸੇਵਾਵਾਂ ਤੁਹਾਡੇ ਲਈ ਉਪਲਬਧ ਹੈ। ਤੁਸੀਂ ਇੱਕ ਦੁਭਾਸ਼ੀਏ ਦੀ ਮਦਦ ਲਈ, ਸਮੱਗਰੀਆਂ ਨੂੰ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿੱਚ ਅਨੁਵਾਦ ਕਰਵਾਉਣ ਲਈ, ਜਾਂ ਕਿਸੇ ਵੱਖ ਫਾਰਮੈਟ ਵਿੱਚ ਪ੍ਰਾਪਤ ਕਰਨ ਲਈ ਬੇਨਤੀ ਕਰ ਸਕਦੇ ਹੋ। ਬਸ ਸਿਰਫ ਸਾਨੂੰ **1-800-464-4000** ਤੇ, ਦਿਨ ਦੇ 24 ਘੰਟੇ, ਹਫ਼ਤੇ ਦੇ 7 ਦਿਨ (ਛੁੱਟੀਆਂ ਵਾਲੇ ਦਿਨ ਬੰਦ ਰਹਿੰਦਾ ਹੈ) ਫੋਨ ਕਰੋ। TTY ਦਾ ਉਪਯੋਗ ਕਰਨ ਵਾਲੇ **711** 'ਤੇ ਫੋਨ ਕਰਨ।

**Russian:** Мы бесплатно обеспечиваем Вас услугами перевода 24 часа в сутки, 7 дней в неделю. Вы можете воспользоваться помощью устного переводчика, запросить перевод материалов на свой язык или запросить их в одном из альтернативных форматов. Просто позвоните нам по телефону **1-800-464-4000**, который доступен 24 часа в сутки, 7 дней в неделю (кроме праздничных дней). Пользователи линии TTY могут звонить по номеру **711**.

**Spanish:** Contamos con asistencia de idiomas sin costo alguno para usted 24 horas al día, 7 días a la semana. Puede solicitar los servicios de un intérprete, que los materiales se traduzcan a su idioma o en formatos alternativos. Solo llame al **1-800-788-0616**, 24 horas al día, 7 días a la semana (cerrado los días festivos). Los usuarios de TTY, deben llamar al **711**.

**Tagalog:** May magagamit na tulong sa wika nang wala kang babayaran, 24 na oras bawat araw, 7 araw bawat linggo. Maaari kang humingi ng mga serbisyo ng tagasalin sa wika, mga babasahin na isinalin sa iyong wika o sa mga alternatibong format. Tawagan lamang kami sa **1-800-464-4000**, 24 na oras bawat araw, 7 araw bawat linggo (sarado sa mga pista opisyal). Ang mga gumagamit ng TTY ay maaaring tumawag sa **711**.

**Thai:** เรามีบริการล่ามฟรีสำหรับคุณตลอด 24 ชั่วโมงทุกวันตลอด 24 ชั่วโมงทำการของเราคุณสามารถขอให้ล่ามช่วยตอบคำถามของคุณที่เกี่ยวข้องกับความคุ้มครองการดูแลสุขภาพของเราและคุณยังสามารถขอให้มีการแปลเอกสารเป็นภาษาที่คุณใช้ได้โดยไม่มีค่าบริการเพียงโทรหาเราที่หมายเลข **1-800-464-4000** ตลอด 24 ชั่วโมงทุกวัน (ปิดให้บริการในวันหยุดราชการ) ผู้ใช้ TTY โปรดโทรไปที่ **711**

**Vietnamese:** Dịch vụ thông dịch được cung cấp miễn phí cho quý vị 24 giờ mỗi ngày, 7 ngày trong tuần. Quý vị có thể yêu cầu dịch vụ thông dịch, tài liệu phiên dịch ra ngôn ngữ của quý vị hoặc tài liệu bằng nhiều hình thức khác. Quý vị chỉ cần gọi cho chúng tôi tại số **1-800-464-4000**, 24 giờ mỗi ngày, 7 ngày trong tuần (trừ các ngày lễ). Người dùng TTY xin gọi **711**.





# Delta Dental

# PPO



# Keep Smiling

## Delta Dental PPO™



### Save with PPO

Visit a dentist in the PPO<sup>1</sup> network to maximize your savings.<sup>2</sup> These dentists have agreed to reduced fees, and you won't get charged more than your expected share of the bill.<sup>3</sup> Find a PPO dentist at [deltadentalins.com](https://deltadentalins.com).

### Set up an online account

Get information about your plan, check benefits and eligibility information, find a network dentist and more. Sign up for an online account at [deltadentalins.com](https://deltadentalins.com).

### Check in without an ID card

You don't need a Delta Dental ID card when you visit the dentist. Just provide your name, birth date and enrollee ID or Social Security number. If your family members are covered under your plan, they'll need your information. Prefer to have an ID card? Simply log in to your account to view or print your card.

### Coordinate dual coverage

If you're covered under two plans, ask your dental office to include information about both plans with your claim — we'll handle the rest.

### Understand transition of care

Generally, multi-stage procedures are covered under your current plan only if treatment began after your plan's effective date of coverage.<sup>4</sup> Log in to your online account to find this date.

### Get LASIK and hearing aid discounts

With access to QualSight and Amplifon Hearing Health Care<sup>5</sup>, you can save as much as 50% on LASIK procedures and more than 60% on hearing aids. To take advantage of these discounts, call QualSight at **855-248-2020** and Amplifon at **888-779-1429**.

## Save with a PPO dentist



<sup>1</sup> In Texas, Delta Dental Insurance Company provides a dental provider organization (DPO) plan.

<sup>2</sup> You can still visit any licensed dentist, but your out-of-pocket costs may be higher if you choose a non-PPO dentist. Network dentists are paid contracted fees.

<sup>3</sup> You are responsible for any applicable deductibles, coinsurance, amounts over annual or lifetime maximums and charges for non-covered services. Out-of-network dentists may bill the difference between their usual fee and Delta Dental's maximum contract allowance.

<sup>4</sup> Applies only to procedures covered under your plan. If you began treatment prior to your effective date of coverage, you or your prior carrier is responsible for any costs. Group- and state-specific exceptions may apply. If you are currently undergoing active orthodontic treatment, you may be eligible to continue treatment under Delta Dental PPO. Review your Evidence of Coverage, Summary Plan Description or Group Dental Service Contract for specific details about your plan.

<sup>5</sup> Vision corrective services and Amplifon's hearing health care services are not insured benefits. Delta Dental makes the vision corrective services program and hearing health care services program available to you to provide access to the preferred pricing for LASIK surgery and for hearing aids and other hearing health services.

**Plan Benefit Highlights for:** CharterLIFE  
(PPO 2000 Plan)

**Group No:** 17072

**DELTA DENTAL PPO<sup>SM</sup>**

**BENEFIT HIGHLIGHTS**

<b>Eligibility</b>	For eligibility details, refer to the plan's Evidence/Certificate of Coverage (on file with your benefits administrator, plan sponsor or employer).			
<b>Deductibles</b> Deductibles waived for Diagnostic & Preventive (D & P) and Orthodontics?	\$50 per person / \$150 per family each calendar year			
	Yes			
<b>Maximums</b> D & P counts toward maximum?	\$2,000 per person each calendar year			
	Yes			
<b>Waiting Period(s)</b>	Basic Services None	Major Services None	Prosthodontics None	Orthodontics None

<b>Benefits and Covered Services*</b>	<b>Delta Dental PPO dentists**</b>	<b>Non-Delta Dental PPO dentists**</b>
<b>Diagnostic &amp; Preventive Services (D &amp; P)</b> Exams, cleanings, x-rays and sealants	100 %	100 %
<b>Basic Services</b> Fillings	80 %	60 %
<b>Endodontics</b> (root canals) Covered Under Basic Services	80 %	60 %
<b>Periodontics</b> (gum treatment) Covered Under Basic Services	80 %	60 %
<b>Oral Surgery</b> Covered Under Basic Services	80 %	60 %
<b>Major Services</b> Crowns, inlays, onlays and cast restorations	50 %	40 %
<b>Prosthodontics</b> Bridges, dentures and implants	50 %	40 %
<b>Orthodontic Benefits</b> Adults and dependent children	50 %	50 %
<b>Orthodontic Maximums</b>	\$2,500 Lifetime	\$2,500 Lifetime

\* Limitations or waiting periods may apply for some benefits; some services may be excluded from your plan. Reimbursement is based on Delta Dental maximum contract allowances and not necessarily each dentist's submitted fees.

\*\* Reimbursement is based on PPO contracted fees for PPO dentists, Premier contracted fees for Premier dentists and program allowance for non-Delta Dental dentists.

<b>Delta Dental of California</b> 560 Mission St., Suite 1300 San Francisco, CA 94105	<b>Customer Service</b> 888-335-8227	<b>Claims Address</b> P.O. Box 997330 Sacramento, CA 95899-7330
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**deltadentalins.com**

This benefit information is not intended or designed to replace or serve as the plan's Evidence of Coverage or Summary Plan Description. If you have specific questions regarding the benefits, limitations or exclusions for your plan, please consult your company's benefits representative.



# Keep Smiling

## Delta Dental PPO™



### Save with PPO

Visit a dentist in the PPO<sup>1</sup> network to maximize your savings.<sup>2</sup> These dentists have agreed to reduced fees, and you won't get charged more than your expected share of the bill.<sup>3</sup> Find a PPO dentist at [deltadentalins.com](https://deltadentalins.com).

### Set up an online account

Get information about your plan, check benefits and eligibility information, find a network dentist and more. Sign up for an online account at [deltadentalins.com](https://deltadentalins.com).

### Check in without an ID card

You don't need a Delta Dental ID card when you visit the dentist. Just provide your name, birth date and enrollee ID or Social Security number. If your family members are covered under your plan, they'll need your information. Prefer to have an ID card? Simply log in to your account to view or print your card.

### Coordinate dual coverage

If you're covered under two plans, ask your dental office to include information about both plans with your claim — we'll handle the rest.

### Understand transition of care

Generally, multi-stage procedures are covered under your current plan only if treatment began after your plan's effective date of coverage.<sup>4</sup> Log in to your online account to find this date.

### Get LASIK and hearing aid discounts

With access to QualSight and Amplifon Hearing Health Care<sup>5</sup>, you can save as much as 50% on LASIK procedures and more than 60% on hearing aids. To take advantage of these discounts, call QualSight at **855-248-2020** and Amplifon at **888-779-1429**.

## Save with a PPO dentist



<sup>1</sup> In Texas, Delta Dental Insurance Company provides a dental provider organization (DPO) plan.

<sup>2</sup> You can still visit any licensed dentist, but your out-of-pocket costs may be higher if you choose a non-PPO dentist. Network dentists are paid contracted fees.

<sup>3</sup> You are responsible for any applicable deductibles, coinsurance, amounts over annual or lifetime maximums and charges for non-covered services. Out-of-network dentists may bill the difference between their usual fee and Delta Dental's maximum contract allowance.

<sup>4</sup> Applies only to procedures covered under your plan. If you began treatment prior to your effective date of coverage, you or your prior carrier is responsible for any costs. Group- and state-specific exceptions may apply. If you are currently undergoing active orthodontic treatment, you may be eligible to continue treatment under Delta Dental PPO. Review your Evidence of Coverage, Summary Plan Description or Group Dental Service Contract for specific details about your plan.

<sup>5</sup> Vision corrective services and Amplifon's hearing health care services are not insured benefits. Delta Dental makes the vision corrective services program and hearing health care services program available to you to provide access to the preferred pricing for LASIK surgery and for hearing aids and other hearing health services.

**Plan Benefit Highlights for:** CharterLIFE  
(PPO 1000 Plan)

**Group No:** 17072

**DELTA DENTAL PPO<sup>SM</sup>**

**BENEFIT HIGHLIGHTS**

<b>Eligibility</b>	For eligibility details, refer to the plan's Evidence/Certificate of Coverage (on file with your benefits administrator, plan sponsor or employer).			
<b>Deductibles</b> Deductibles waived for Diagnostic & Preventive (D & P) and Orthodontics?	\$50 per person / \$150 per family each calendar year			
	Yes			
<b>Maximums</b> D & P counts toward maximum?	\$1,000 per person each calendar year			
	Yes			
<b>Waiting Period(s)</b>	Basic Services None	Major Services None	Prosthodontics None	Orthodontics None

<b>Benefits and Covered Services*</b>	<b>Delta Dental PPO dentists**</b>	<b>Non-Delta Dental PPO dentists**</b>
<b>Diagnostic &amp; Preventive Services (D &amp; P)</b> Exams, cleanings, x-rays and sealants	100 %	100 %
<b>Basic Services</b> Fillings	80 %	60 %
<b>Endodontics</b> (root canals) Covered Under Basic Services	80 %	60 %
<b>Periodontics</b> (gum treatment) Covered Under Basic Services	80 %	60 %
<b>Oral Surgery</b> Covered Under Basic Services	80 %	60 %
<b>Major Services</b> Crowns, inlays, onlays and cast restorations	50 %	40 %
<b>Prosthodontics</b> Bridges, dentures and implants	50 %	40 %
<b>Orthodontic Benefits</b> Dependent children to age 19	50 %	50 %
<b>Orthodontic Maximums</b>	\$1,500 Lifetime	\$1,500 Lifetime

\* Limitations or waiting periods may apply for some benefits; some services may be excluded from your plan. Reimbursement is based on Delta Dental maximum contract allowances and not necessarily each dentist's submitted fees.

\*\* Reimbursement is based on PPO contracted fees for PPO dentists, Premier contracted fees for Premier dentists and program allowance for non-Delta Dental dentists.

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# Delta Dental DHMO



# DeltaCare® USA – provided by Delta Dental of California



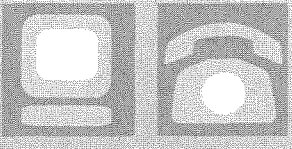
We'll do **whatever it takes and then some.**

**Find a DeltaCare USA dentist**

Select from among the many conveniently located DeltaCare USA contracted general dentists. To find the most current listing of DeltaCare USA dental offices you can:

Visit our website at [deltadentalins.com/enrollees](http://deltadentalins.com/enrollees). Under Find a dentist, select DeltaCare USA as your network.

Or call Customer Service at **800-422-4234** for help in finding a DeltaCare USA dentist.



## Welcome to DeltaCare USA – quality, convenience, predictable costs

DeltaCare USA (administered by Delta Dental Insurance Company) provides you and your family with quality dental benefits at an affordable cost. The DeltaCare USA program is designed to encourage you and your family to visit the dentist regularly to maintain your dental health.

When you enroll, you select a contract dentist to provide services. The DeltaCare USA network consists of private practice dental facilities that have been carefully screened for quality.

Enroll in DeltaCare USA and you'll enjoy these features:

### Quality

- Extensive benefits for you and your family
- No restrictions on pre-existing conditions, except for work in progress
- Large, stable network of dentists, so you can enjoy a long-term relationship with your dentist

### Convenience

- No claim forms to complete
- Easy access to specialty care
- Expanded business hours for toll-free customer service, from 5 a.m. to 6 p.m., Pacific time

### Predictable costs

- No deductibles
- Out-of-pocket costs are clearly defined
- Out-of-area dental emergency coverage up to \$100 per emergency
- No annual or lifetime dollar maximums



Administered by Delta Dental Insurance Company



## Highlights of your DeltaCare USA Program

### What if I have questions about my DeltaCare USA Program?

#### Eligibility for you and your family

If you meet your group's eligibility requirements for dental coverage, you can enroll in the DeltaCare USA program. You may also enroll eligible dependents. Contact your benefits administrator if you have any questions.

#### Easy enrollment

Simply complete the enrollment process as directed by your benefits administrator. Be sure to indicate a dentist (from the list of contract dental facilities) for both yourself and your eligible dependents. Include the name of your group.

#### How your DeltaCare USA program works

Your selected contract dentist will take care of your dental care needs. If you require treatment from a specialist, your contract dentist will handle the referral for you.

After you have enrolled, you will receive a Delta Dental membership packet that includes an identification card and an Evidence of Coverage booklet that fully describes the benefits of your dental program. Also included in this packet are the name, address and phone number of your contract dentist. Simply call the dental facility to make an appointment.

Under the DeltaCare USA program, many services are covered at no cost, while others have copayments (amount you pay your contract dentist) for certain benefits. See the "Description of Benefits and Copayments" for a list of your benefits.

Please note: Dental services that are not performed by your selected contract dentist, or are not covered under provisions for emergency care below, must be preauthorized by Delta Dental to be covered by your DeltaCare USA program.

#### Provisions for emergency care

Under your DeltaCare USA program, you and your eligible dependents are covered for out-of-network dental emergencies. Your program pays up to \$100 for out-of-network emergency dental expenses per emergency for each enrollee.

#### My dentist is a Delta Dental dentist but is not on the list of DeltaCare USA dentists. Can I still receive treatment from this dentist?

You must receive treatment from your selected DeltaCare USA contract dentist. Please note that Delta Dental dentists are not necessarily DeltaCare USA dentists. With more than 3,800 general and specialist dentists, the DeltaCare USA network is one of the largest dental networks in California.

#### Do my family members receive treatment from the same DeltaCare USA contract dentist?

You and your eligible dependents may receive care from the same contract dentist, or if you prefer, you may collectively select up to a maximum of three individual contract dental facilities.

#### Can I change my contract dentist?

You may change contract dentists by notifying us either by phone or in writing, or by visiting our website ([deltadentalins.com](http://deltadentalins.com)). If you contact us by the 21st of the month, the change will become effective the first of the following month.

#### Can I have my teeth whitened under the DeltaCare USA program?

External bleaching is a benefit under your program. See the "Description of Benefits and Copayments" and talk to your contract dentist about your options.



## Highlights of your DeltaCare USA Program

### Does my DeltaCare USA program cover tooth-colored fillings and crowns?

Porcelain and other tooth-colored materials are included as a benefit under your program. The copayment shows you what your out of pocket cost will be.

### How long does it take to get an appointment with a DeltaCare USA dentist?

Two to four weeks is a reasonable amount of time to wait for a routine, non-urgent appointment. If you require a specific time, you may have to wait longer. Most DeltaCare USA dentists are in private group practices, which means greater appointment availability and extended office hours.

### Are pre-existing dental conditions and work in progress covered?

Treatment for pre-existing conditions, such as extracted teeth, is covered under the DeltaCare USA program. However, benefits are not provided for any dental treatment started before joining the program (that is, work in progress, such as preparations for crowns, root canals and impressions for dentures). Orthodontic treatment in progress may be covered for new DeltaCare USA enrollees. See the "Limitations and Exclusions of Benefits."

### How does the DeltaCare USA program encourage preventive care?

Your DeltaCare USA program is designed to encourage regular visits to the dentist by having no copayments (fees you pay to the contract dentist) on most diagnostic and preventive benefits. See the enclosed "Description of Benefits and Copayments."

### Does my DeltaCare USA program cover specialists' services?

Your contract dentist will coordinate your specialty care needs for oral surgery, endodontics, periodontics or pediatric dentistry with an approved contract specialist. If there is no contract specialist within your service area, a referral to an out-of-network specialist will be authorized at no extra cost, other than the applicable copayment. If you or your dependent is assigned to a dental school clinic for specialty services, those services may be provided by a dentist, a dental student, a clinician or a dental instructor.

### What if I have questions about my DeltaCare USA program?

Call Delta Dental Customer Service at 800-422-4234. We have multilingual representatives available from 5 a.m. to 6 p.m. Pacific time, Monday through Friday. Our Customer Service representatives can answer benefits questions, as well as arrange facility transfers and urgent care referrals.

**Our Customer Service representatives have worked in dental facilities and can answer benefits questions, as well as arrange facility transfers and urgent care referrals.**

**SCHEDULE A**

**Description of Benefits and Copayments**

The Benefits shown below are performed as deemed appropriate by the attending Contract Dentist subject to the limitations and exclusions of the Program. Please refer to *Schedule B* for further clarification of Benefits. **Enrollees should discuss all treatment options with their Contract Dentist prior to services being rendered.**

**Text that appears in italics below is specifically intended to clarify the delivery of Benefits under the DeltaCare USA Program and is not to be interpreted as CDT-2016 procedure codes, descriptors or nomenclature that are under copyright by the American Dental Association. The American Dental Association may periodically change CDT codes or definitions. Such updated codes, descriptors and nomenclature may be used to describe these covered procedures in compliance with federal legislation.**

CODE	DESCRIPTION	ENROLLEE PAYS
<b>D0100-D0999 I. DIAGNOSTIC</b>		
D0120	Periodic oral evaluation - established patient .....	No Cost
D0140	Limited oral evaluation - problem focused .....	No Cost
D0145	Oral evaluation for a patient under three years of age and counseling with primary caregiver .....	No Cost
D0150	Comprehensive oral evaluation - new or established patient .....	No Cost
D0160	Detailed and extensive oral evaluation - problem focused, by report .....	No Cost
D0170	Re-evaluation - limited, problem focused (established patient; not post-operative visit) .....	No Cost
D0171	Re-evaluation - post-operative office visit .....	\$5.00
D0180	Comprehensive periodontal evaluation - new or established patient .....	No Cost
D0190	Screening of a patient .....	No Cost
D0191	Assessment of a patient .....	No Cost
D0210	Intraoral - complete series of radiographic images - <i>limited to 1 series every 24 months</i> .....	No Cost
D0220	Intraoral - periapical first radiographic image .....	No Cost
D0230	Intraoral - periapical each additional radiographic image .....	No Cost
D0240	Intraoral - occlusal radiographic image .....	No Cost
D0250	Extraoral - 2D projection radiographic image created using a stationary radiation source, and detector .....	No Cost
D0251	Extraoral posterior dental radiographic image .....	No Cost
D0270	Bitewing - single radiographic image .....	No Cost
D0272	Bitewings - two radiographic images .....	No Cost
D0273	Bitewings three radiographic images .....	No Cost
D0274	Bitewings - four radiographic images - <i>limited to 1 series every 6 months</i> .....	No Cost
D0277	Vertical bitewings - 7 to 8 radiographic images .....	No Cost
D0330	Panoramic radiographic image .....	No Cost
D0415	Collection of microorganisms for culture and sensitivity .....	No Cost
D0425	Caries susceptibility tests .....	No Cost
D0460	Pulp vitality tests .....	No Cost
D0470	Diagnostic casts .....	No Cost
D0472	Accession of tissue, gross examination, preparation and transmission of written report .....	No Cost
D0473	Accession of tissue, gross and microscopic examination, preparation and transmission of written report .....	No Cost
D0474	Accession of tissue, gross and microscopic examination, including assessment of surgical margins for presence of disease, preparation and transmission of written report .....	No Cost
D0601	Caries risk assessment and documentation, with a finding of low risk - <i>limited to children age 3 to 19, 1 every 3 years</i> .....	No Cost
D0602	Caries risk assessment and documentation, with a finding of moderate risk - <i>limited to children age 3 to 19, 1 every 3 years</i> .....	No Cost
D0603	Caries risk assessment and documentation, with a finding of high risk - <i>limited to children age 3 to 19, 1 every 3 years</i> .....	No Cost
D0999	Unspecified diagnostic procedure, by report - <i>includes office visit, per visit (in addition to other services)</i> .....	No Cost
<b>D1000-D1999 II. PREVENTIVE</b>		
D1110	Prophylaxis <i>cleaning</i> - adult - <i>1 per 6 month period</i> .....	No Cost
D1110	<i>Additional prophylaxis cleaning</i> - adult ( <i>within the 6 month period</i> ) .....	\$45.00
D1120	Prophylaxis <i>cleaning</i> - child - <i>1 per 6 month period</i> .....	No Cost
D1120	<i>Additional prophylaxis cleaning</i> - child ( <i>within the 6 month period</i> ) .....	\$35.00
D1206	Topical application of fluoride varnish - <i>child to age 19; 1 D1206 or D1208 per 6 month period</i> .....	No Cost

D1208	Topical application of fluoride - excluding varnish - <i>child to age 19; 1 D1206 or D1208 per 6 month period</i> .....	No Cost
D1310	Nutritional counseling for control of dental disease .....	No Cost
D1330	Oral hygiene instructions .....	No Cost
D1351	Sealant - per tooth - <i>limited to permanent molars through age 15</i> .....	\$10.00
D1352	Preventive resin restoration in a moderate to high caries risk patient - permanent tooth - <i>limited to permanent molars through age 15</i> .....	\$10.00
D1353	Sealant repair - per tooth - <i>limited to permanent molars through age 15</i> .....	\$10.00
D1354	Interim caries arresting medicament application - <i>child to age 19; 1 per 6 month period</i> .....	No Cost
D1510	Space maintainer - fixed - unilateral .....	\$35.00
D1515	Space maintainer - fixed - bilateral .....	\$35.00
D1520	Space maintainer - removable - unilateral .....	\$35.00
D1525	Space maintainer - removable - bilateral .....	\$35.00
D1550	Re-cement or re-bond space maintainer .....	No Cost
D1555	Removal of fixed space maintainer .....	No Cost

**D2000-D2999 III. RESTORATIVE**

- Includes polishing, all adhesives and bonding agents, indirect pulp capping, bases, liners and acid etch procedures.

- When there are more than six crowns in the same treatment plan, an Enrollee may be charged an additional \$100.00 per crown, beyond the 6th unit.

- Replacement of crowns, inlays and onlays requires the existing restoration to be 5+ years old.

D2140	Amalgam - one surface, primary or permanent .....	\$5.00
D2150	Amalgam - two surfaces, primary or permanent .....	\$10.00
D2160	Amalgam - three surfaces, primary or permanent .....	\$15.00
D2161	Amalgam - four or more surfaces, primary or permanent .....	\$20.00
D2330	Resin-based composite - one surface, anterior .....	\$22.00
D2331	Resin-based composite - two surfaces, anterior .....	\$26.00
D2332	Resin-based composite - three surfaces, anterior .....	\$28.00
D2335	Resin-based composite - four or more surfaces or involving incisal angle (anterior) .....	\$40.00
D2390	Resin-based composite crown, anterior .....	\$50.00
D2391	Resin-based composite - one surface, posterior .....	\$65.00
D2392	Resin-based composite - two surfaces, posterior .....	\$75.00
D2393	Resin-based composite - three surfaces, posterior .....	\$85.00
D2394	Resin-based composite - four or more surfaces, posterior .....	\$95.00
D2510	Inlay - metallic - one surface .....	\$45.00
D2520	Inlay - metallic - two surfaces .....	\$50.00
D2530	Inlay - metallic - three or more surfaces .....	\$55.00
D2542	Onlay - metallic - two surfaces .....	\$55.00
D2543	Onlay - metallic - three surfaces .....	\$60.00
D2544	Onlay - metallic - four or more surfaces .....	\$65.00
D2610	Inlay - porcelain/ceramic - one surface .....	\$215.00
D2620	Inlay - porcelain/ceramic - two surfaces .....	\$245.00
D2630	Inlay - porcelain/ceramic - three or more surfaces .....	\$260.00
D2642	Onlay - porcelain/ceramic - two surfaces .....	\$240.00
D2643	Onlay - porcelain/ceramic - three surfaces .....	\$270.00
D2644	Onlay - porcelain/ceramic - four or more surfaces .....	\$285.00
D2650	Inlay - resin-based composite - one surface .....	\$135.00
D2651	Inlay - resin-based composite - two surfaces .....	\$155.00
D2652	Inlay - resin-based composite - three or more surfaces .....	\$185.00
D2662	Onlay - resin-based composite - two surfaces .....	\$180.00
D2663	Onlay - resin-based composite - three surfaces .....	\$200.00
D2664	Onlay - resin-based composite - four or more surfaces .....	\$235.00
D2710	Crown - resin-based composite (indirect) .....	\$85.00
D2712	Crown - ¾ resin-based composite (indirect) .....	\$85.00
D2720	Crown - resin with high noble metal .....	\$245.00
D2721	Crown - resin with predominantly base metal .....	\$145.00
D2722	Crown - resin with noble metal .....	\$185.00
D2740	Crown - porcelain/ceramic substrate .....	\$295.00
D2750	Crown - porcelain fused to high noble metal .....	\$295.00

D2751	Crown - porcelain fused to predominantly base metal .....	\$195.00
D2752	Crown - porcelain fused to noble metal .....	\$235.00
D2780	Crown - ¾ cast high noble metal .....	\$260.00
D2781	Crown - ¾ cast predominantly base metal .....	\$160.00
D2782	Crown - ¾ cast noble metal .....	\$200.00
D2783	Crown - ¾ porcelain/ceramic .....	\$295.00
D2790	Crown - full cast high noble metal .....	\$260.00
D2791	Crown - full cast predominantly base metal .....	\$160.00
D2792	Crown - full cast noble metal .....	\$200.00
D2794	Crown - titanium .....	\$295.00
D2910	Re-cement or re-bond inlay, onlay, veneer or partial coverage restoration .....	\$10.00
D2915	Re-cement or re-bond indirectly fabricated or prefabricated post and core .....	\$10.00
D2920	Re-cement or re-bond crown .....	\$10.00
D2921	Reattachment of tooth fragment, incisal edge or cusp ( <i>anterior</i> ) .....	\$40.00
D2929	Prefabricated porcelain/ceramic crown - primary tooth - <i>anterior</i> .....	\$30.00
D2930	Prefabricated stainless steel crown - primary tooth .....	\$25.00
D2931	Prefabricated stainless steel crown - permanent tooth .....	\$25.00
D2932	Prefabricated resin crown - <i>anterior primary tooth</i> .....	\$35.00
D2933	Prefabricated stainless steel crown with resin window - <i>anterior primary tooth</i> .....	\$30.00
D2940	Protective restoration .....	\$10.00
D2941	Interim therapeutic restoration - primary dentition .....	\$10.00
D2949	Restorative foundation for an indirect restoration .....	\$20.00
D2950	Core buildup, including any pins when required .....	\$20.00
D2951	Pin retention - per tooth, in addition to restoration .....	\$15.00
D2952	Post and core in addition to crown, indirectly fabricated - <i>includes canal preparation</i> .....	\$60.00
D2953	Each additional indirectly fabricated post - same tooth - <i>includes canal preparation</i> .....	\$45.00
D2954	Prefabricated post and core in addition to crown - <i>base metal post; includes canal preparation</i> .....	\$45.00
D2957	Each additional prefabricated post - same tooth - <i>base metal post; includes canal preparation</i> .....	\$35.00
D2971	Additional procedures to construct new crown under existing partial denture framework .....	\$39.00
D2980	Crown repair necessitated by restorative material failure .....	\$20.00
D2981	Inlay repair necessitated by restorative material failure .....	\$20.00
D2982	Onlay repair necessitated by restorative material failure .....	\$20.00
D2983	Veneer repair necessitated by restorative material failure .....	\$20.00
D2990	Resin infiltration of incipient smooth surface lesions - <i>limited to permanent molars through age 15</i> .....	\$10.00

**D3000-D3999 IV. ENDODONTICS**

D3110	Pulp cap - direct (excluding final restoration) .....	No Cost
D3120	Pulp cap - indirect (excluding final restoration) .....	No Cost
D3220	Therapeutic pulpotomy (excluding final restoration) - removal of pulp coronal to the dentinocemental junction and application of medicament .....	\$15.00
D3221	Pulpal debridement, primary and permanent teeth .....	\$20.00
D3222	Partial pulpotomy for apexogenesis - permanent tooth with incomplete root development .....	\$15.00
D3230	Pulpal therapy (resorbable filling) - anterior, primary tooth (excluding final restoration) .....	\$30.00
D3240	Pulpal therapy (resorbable filling) - posterior, primary tooth (excluding final restoration) .....	\$30.00
D3310	<i>Root canal</i> - endodontic therapy, anterior tooth (excluding final restoration) .....	\$85.00
D3320	<i>Root canal</i> - endodontic therapy, bicuspid tooth (excluding final restoration) .....	\$150.00
D3330	<i>Root canal</i> - endodontic therapy, molar (excluding final restoration) .....	\$280.00
D3331	Treatment of root canal obstruction; non-surgical access .....	\$85.00
D3332	Incomplete endodontic therapy; inoperable, unrestorable or fractured tooth .....	\$85.00
D3333	Internal root repair of perforation defects .....	\$85.00
D3346	Retreatment of previous root canal therapy - anterior .....	\$115.00
D3347	Retreatment of previous root canal therapy - bicuspid .....	\$180.00
D3348	Retreatment of previous root canal therapy - molar .....	\$310.00
D3351	Apexification/recalcification - initial visit (apical closure/calcific repair of perforations, root resorption, etc.) .....	\$80.00
D3352	Apexification/recalcification - interim medication replacement (apical closure/calcific repair of perforations, root resorption, pulp space disinfection, etc.) .....	\$55.00



D3353	Apexification/recalcification - final visit (includes completed root canal therapy - apical closure/calcific repair of perforations, root resorption, etc.) .....	\$55.00
D3410	Apicoectomy - anterior .....	\$90.00
D3421	Apicoectomy - bicuspid (first root) .....	\$100.00
D3425	Apicoectomy - molar (first root) .....	\$110.00
D3426	Apicoectomy (each additional root) .....	\$65.00
D3427	Periradicular surgery without apicoectomy .....	\$90.00
D3430	Retrograde filling - per root .....	\$60.00
D3450	Root amputation - per root .....	No Cost
D3920	Hemisection (including any root removal), not including root canal therapy .....	\$40.00

**D4000-D4999 V. PERIODONTICS**

- Includes preoperative and postoperative evaluations and treatment under a local anesthetic.

D4210	Gingivectomy or gingivoplasty - four or more contiguous teeth or tooth bounded spaces per quadrant .....	\$135.00
D4211	Gingivectomy or gingivoplasty - one to three contiguous teeth or tooth bounded spaces per quadrant .....	\$80.00
D4212	Gingivectomy or gingivoplasty to allow access for restorative procedure, per tooth .....	\$80.00
D4240	Gingival flap procedure, including root planing - four or more contiguous teeth or tooth bounded spaces per quadrant .....	\$135.00
D4241	Gingival flap procedure, including root planing - one to three contiguous teeth or tooth bounded spaces per quadrant .....	\$80.00
D4245	Apically positioned flap .....	\$130.00
D4249	Clinical crown lengthening - hard tissue .....	\$125.00
D4260	Osseous surgery (including elevation of a full thickness flap and closure) - four or more contiguous teeth or tooth bounded spaces per quadrant .....	\$300.00
D4261	Osseous surgery (including elevation of a full thickness flap and closure) - one to three contiguous teeth or tooth bounded spaces per quadrant .....	\$240.00
D4263	Bone replacement graft - first site in quadrant .....	\$215.00
D4264	Bone replacement graft - each additional site in quadrant .....	\$80.00
D4270	Pedicle soft tissue graft procedure .....	\$215.00
D4274	Distal or proximal wedge procedure (when not performed in conjunction with surgical procedures in the same anatomical area) .....	\$50.00
D4277	Free soft tissue graft procedure (including recipient and donor surgical sites) first tooth, implant, or edentulous tooth position in graft .....	\$215.00
D4278	Free soft tissue graft procedure (including recipient and donor surgical sites) each additional contiguous tooth, implant, or edentulous tooth position in same graft site .....	\$215.00
D4341	Periodontal scaling and root planing - four or more teeth per quadrant - limited to 4 quadrants during any 12 consecutive months .....	\$40.00
D4342	Periodontal scaling and root planing - one to three teeth per quadrant - limited to 4 quadrants during any 12 consecutive months .....	\$30.00
D4355	Full mouth debridement to enable comprehensive evaluation and diagnosis - limited to 1 treatment in any 12 consecutive months .....	\$40.00
D4910	Periodontal maintenance - limited to 1 treatment each 6 month period .....	\$30.00
D4910	Additional periodontal maintenance (within the 6 month period) .....	\$55.00
D4921	Gingival irrigation - per quadrant .....	No Cost

**D5000-D5899 VI. PROSTHODONTICS (removable)**

- For all listed dentures and partial dentures, Copayment includes after delivery adjustments and tissue conditioning, if needed, for the first six months after placement. The Enrollee must continue to be eligible, and the service must be provided at the Contract Dentist's facility where the denture was originally delivered.

- Rebases, relines and tissue conditioning are limited to 1 per denture during any 12 consecutive months.

- Replacement of a denture or a partial denture requires the existing denture to be 5+ years old.

D5110	Complete denture - maxillary .....	\$215.00
D5120	Complete denture - mandibular .....	\$215.00
D5130	Immediate denture - maxillary .....	\$235.00
D5140	Immediate denture - mandibular .....	\$235.00
D5211	Maxillary partial denture - resin base (including any conventional clasps, rests and teeth) .....	\$180.00
D5212	Mandibular partial denture - resin base (including any conventional clasps, rests and teeth) .....	\$180.00
D5213	Maxillary partial denture - cast metal framework with resin denture bases (including any conventional clasps, rests and teeth) .....	\$240.00

D5214	Mandibular partial denture - cast metal framework with resin denture bases (including any conventional clasps, rests and teeth) .....	\$240.00
D5221	Immediate maxillary partial denture - resin base (including any conventional clasps, rests and teeth) .....	\$180.00
D5222	Immediate mandibular partial denture - resin base (including any conventional clasps, rests and teeth) .....	\$180.00
D5223	Immediate maxillary partial denture - cast metal framework with resin denture bases (including any conventional clasps, rests and teeth) .....	\$240.00
D5224	Immediate mandibular partial denture - cast metal framework with resin denture bases (including any conventional clasps, rests and teeth) .....	\$240.00
D5225	Maxillary partial denture - flexible base (including any clasps, rests and teeth) .....	\$290.00
D5226	Mandibular partial denture - flexible base (including any clasps, rests and teeth) .....	\$290.00
D5410	Adjust complete denture - maxillary .....	\$10.00
D5411	Adjust complete denture - mandibular .....	\$10.00
D5421	Adjust partial denture - maxillary .....	\$10.00
D5422	Adjust partial denture - mandibular .....	\$10.00
D5510	Repair broken complete denture base .....	\$25.00
D5520	Replace missing or broken teeth - complete denture (each tooth) .....	\$15.00
D5610	Repair resin denture base .....	\$25.00
D5620	Repair cast framework .....	\$25.00
D5630	Repair or replace broken clasp - per tooth .....	\$25.00
D5640	Replace broken teeth - per tooth .....	\$15.00
D5650	Add tooth to existing partial denture .....	\$15.00
D5660	Add clasp to existing partial denture - per tooth .....	\$15.00
D5670	Replace all teeth and acrylic on cast metal framework (maxillary) .....	\$150.00
D5671	Replace all teeth and acrylic on cast metal framework (mandibular) .....	\$150.00
D5710	Rebase complete maxillary denture .....	\$70.00
D5711	Rebase complete mandibular denture .....	\$70.00
D5720	Rebase maxillary partial denture .....	\$70.00
D5721	Rebase mandibular partial denture .....	\$70.00
D5730	Reline complete maxillary denture (chairside) .....	\$35.00
D5731	Reline complete mandibular denture (chairside) .....	\$35.00
D5740	Reline maxillary partial denture (chairside) .....	\$35.00
D5741	Reline mandibular partial denture (chairside) .....	\$35.00
D5750	Reline complete maxillary denture (laboratory) .....	\$75.00
D5751	Reline complete mandibular denture (laboratory) .....	\$75.00
D5760	Reline maxillary partial denture (laboratory) .....	\$75.00
D5761	Reline mandibular partial denture (laboratory) .....	\$75.00
D5820	Interim partial denture (maxillary) - <i>limited to 1 in any 12 consecutive months</i> .....	\$90.00
D5821	Interim partial denture (mandibular) - <i>limited to 1 in any 12 consecutive months</i> .....	\$90.00
D5850	Tissue conditioning, maxillary .....	\$15.00
D5851	Tissue conditioning, mandibular .....	\$15.00

**D5900-D5999 VII. MAXILLOFACIAL PROSTHETICS - Not Covered****D6000-D6199 VIII. IMPLANT SERVICES - Not Covered****D6200-D6999 IX. PROSTHODONTICS, fixed (each retainer and each pontic constitutes a unit in a fixed partial denture [bridge])**

- When a crown and/or pontic exceeds six units in the same treatment plan, an Enrollee may be charged an additional \$100.00 per unit, beyond the 6th unit.

- Replacement of a crown, pontic, inlay, onlay or stress breaker requires the existing bridge to be 5+ years old.

D6210	Pontic - cast high noble metal .....	\$260.00
D6211	Pontic - cast predominantly base metal .....	\$160.00
D6212	Pontic - cast noble metal .....	\$200.00
D6240	Pontic - porcelain fused to high noble metal .....	\$295.00
D6241	Pontic - porcelain fused to predominantly base metal .....	\$195.00
D6242	Pontic - porcelain fused to noble metal .....	\$235.00
D6245	Pontic - porcelain/ceramic .....	\$295.00
D6250	Pontic - resin with high noble metal .....	\$245.00
D6251	Pontic - resin with predominantly base metal .....	\$145.00

D6252	Pontic - resin with noble metal .....	\$195.00
D6600	Retainer inlay - porcelain/ceramic, two surfaces .....	\$245.00
D6601	Retainer inlay - porcelain/ceramic, three or more surfaces .....	\$260.00
D6602	Retainer inlay - cast high noble metal, two surfaces .....	\$150.00
D6603	Retainer inlay - cast high noble metal, three or more surfaces .....	\$155.00
D6604	Retainer inlay - cast predominantly base metal, two surfaces .....	\$50.00
D6605	Retainer inlay - cast predominantly base metal, three or more surfaces .....	\$55.00
D6606	Retainer inlay - cast noble metal, two surfaces .....	\$90.00
D6607	Retainer inlay - cast noble metal, three or more surfaces .....	\$95.00
D6608	Retainer onlay - porcelain/ceramic, two surfaces .....	\$240.00
D6609	Retainer onlay - porcelain/ceramic, three or more surfaces .....	\$270.00
D6610	Retainer onlay - cast high noble metal, two surfaces .....	\$155.00
D6611	Retainer onlay - cast high noble metal, three or more surfaces .....	\$160.00
D6612	Retainer onlay - cast predominantly base metal, two surfaces .....	\$55.00
D6613	Retainer onlay - cast predominantly base metal, three or more surfaces .....	\$65.00
D6614	Retainer onlay - cast noble metal, two surfaces .....	\$95.00
D6615	Retainer onlay - cast noble metal, three or more surfaces .....	\$105.00
D6720	Retainer crown - resin with high noble metal .....	\$245.00
D6721	Retainer crown - resin with predominantly base metal .....	\$145.00
D6722	Retainer crown - resin with noble metal .....	\$185.00
D6740	Retainer crown - porcelain/ceramic .....	\$295.00
D6750	Retainer crown - porcelain fused to high noble metal .....	\$295.00
D6751	Retainer crown - porcelain fused to predominantly base metal .....	\$195.00
D6752	Retainer crown - porcelain fused to noble metal .....	\$235.00
D6780	Retainer crown - ¾ cast high noble metal .....	\$260.00
D6781	Retainer crown - ¾ cast predominantly base metal .....	\$160.00
D6782	Retainer crown - ¾ cast noble metal .....	\$200.00
D6783	Retainer crown - ¾ porcelain/ceramic .....	\$295.00
D6790	Retainer crown - full cast high noble metal .....	\$260.00
D6791	Retainer crown - full cast predominantly base metal .....	\$160.00
D6792	Retainer crown - full cast noble metal .....	\$200.00
D6930	Re-cement or re-bond fixed partial denture .....	\$15.00
D6940	Stress breaker .....	\$25.00
D6980	Fixed partial denture repair necessitated by restorative material failure .....	\$30.00

**D7000-D7999 X. ORAL AND MAXILLOFACIAL SURGERY**

- Includes preoperative and postoperative evaluations and treatment under a local anesthetic.

D7111	Extraction, coronal remnants - deciduous tooth .....	\$5.00
D7140	Extraction, erupted tooth or exposed root (elevation and/or forceps removal) .....	\$8.00
D7210	Surgical removal of erupted tooth requiring removal of bone and/or sectioning of tooth, and including elevation of mucoperiosteal flap if indicated .....	\$45.00
D7220	Removal of impacted tooth - soft tissue .....	\$55.00
D7230	Removal of impacted tooth - partially bony .....	\$75.00
D7240	Removal of impacted tooth - completely bony .....	\$95.00
D7241	Removal of impacted tooth - completely bony, with unusual surgical complications .....	\$115.00
D7250	Surgical removal of residual tooth roots (cutting procedure) .....	\$25.00
D7251	Coronectomy - intentional partial tooth removal .....	\$115.00
D7270	Tooth reimplantation and/or stabilization of accidentally evulsed or displaced tooth .....	\$95.00
D7280	Surgical access of an unerupted tooth .....	\$120.00
D7282	Mobilization of erupted or malpositioned tooth to aid eruption .....	\$120.00
D7283	Placement of device to facilitate eruption of impacted tooth .....	No Cost
D7286	Incisional biopsy of oral tissue - soft - <i>does not include pathology laboratory procedures</i> .....	\$25.00
D7310	Alveoloplasty in conjunction with extractions - four or more teeth or tooth spaces, per quadrant .....	\$50.00
D7311	Alveoloplasty in conjunction with extractions - one to three teeth or tooth spaces, per quadrant .....	\$50.00
D7320	Alveoloplasty not in conjunction with extractions - four or more teeth or tooth spaces, per quadrant .....	\$70.00
D7321	Alveoloplasty not in conjunction with extractions - one to three teeth or tooth spaces, per quadrant .....	\$70.00
D7450	Removal of benign odontogenic cyst or tumor - lesion diameter up to 1.25 cm .....	No Cost



<b>Plan CA12A</b>	<b>DeltaCare USA</b>	<b>Description of Benefits and Copayments</b>
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D7451	Removal of benign odontogenic cyst or tumor - lesion diameter greater than 1.25 cm .....	No Cost
D7471	Removal of lateral exostosis (maxilla or mandible) .....	\$25.00
D7472	Removal of torus palatinus .....	\$25.00
D7473	Removal of torus mandibularis .....	\$25.00
D7510	Incision and drainage of abscess - intraoral soft tissue .....	No Cost
D7960	Frenulectomy - also known as frenectomy or frenotomy - separate procedure not incidental to another procedure	No Cost
D7970	Excision of hyperplastic tissue - per arch .....	\$60.00
D7971	Excision of pericoronal gingiva .....	\$60.00

**D8000-D8999 XI. ORTHODONTICS**

- The listed Copayment for each phase of orthodontic treatment (limited, interceptive or comprehensive) covers up to 24 months of active treatment. Beyond 24 months, an additional monthly fee, not to exceed \$125.00, may apply.  
 - The Retention Copayment includes adjustments and/or office visits up to 24 months.

**Pre and post orthodontic records include:**

The benefit for pre-treatment records and diagnostic services includes: ..... \$200.00

D0210	Intraoral - complete series of radiographic images	
D0322	Tomographic survey	
D0330	Panoramic radiographic image	
D0340	2D cephalometric radiographic image - acquisition, measurement and analysis	
D0350	2D oral/facial photographic images obtained intraorally or extraorally	
D0351	3D photographic image	
D0470	Diagnostic casts	

The benefit for post-treatment records includes: ..... \$70.00

D0210	Intraoral - complete series of radiographic images	
D0470	Diagnostic casts	
D8010	Limited orthodontic treatment of the primary dentition .....	\$950.00
D8020	Limited orthodontic treatment of the transitional dentition - <i>child or adolescent to age 19</i> .....	\$950.00
D8030	Limited orthodontic treatment of the adolescent dentition - <i>adolescent to age 19</i> .....	\$950.00
D8040	Limited orthodontic treatment of the adult dentition - <i>adults, including covered dependent adult children</i> .....	\$1,150.00
D8050	Interceptive orthodontic treatment of the primary dentition .....	\$950.00
D8060	Interceptive orthodontic treatment of the transitional dentition .....	\$950.00
D8070	Comprehensive orthodontic treatment of the transitional dentition - <i>child or adolescent to age 19</i> .....	\$1,700.00
D8080	Comprehensive orthodontic treatment of the adolescent dentition - <i>adolescent to age 19</i> .....	\$1,700.00
D8090	Comprehensive orthodontic treatment of the adult dentition - <i>adults, including covered dependent adult children</i> ..	\$1,900.00
D8660	Pre-orthodontic treatment examination to monitor growth and development .....	\$25.00
D8680	Orthodontic retention (removal of appliances, construction and placement of <i>removable</i> retainers) .....	\$275.00
D8681	Removable orthodontic retainer adjustment .....	No Cost
D8999	Unspecified orthodontic procedure, by report - <i>includes treatment planning session</i> .....	\$100.00

**D9000-D9999 XII. ADJUNCTIVE GENERAL SERVICES**

D9110	Palliative (emergency) treatment of dental pain - minor procedure .....	\$10.00
D9211	Regional block anesthesia .....	No Cost
D9212	Trigeminal division block anesthesia .....	No Cost
D9215	Local anesthesia in conjunction with operative or surgical procedures .....	No Cost
D9219	Evaluation for deep sedation or general anesthesia .....	No Cost
D9223	Deep sedation/general anesthesia - each 15 minute increment .....	\$80.00
D9243	Intravenous moderate (conscious) sedation/analgesia - each 15 minute increment .....	\$80.00
D9310	Consultation - diagnostic service provided by dentist or physician other than requesting dentist or physician .....	\$10.00
D9430	Office visit for observation (during regularly scheduled hours) - no other services performed .....	\$5.00
D9440	Office visit - after regularly scheduled hours .....	\$25.00
D9450	Case presentation, detailed and extensive treatment planning .....	No Cost
D9932	Cleaning and inspection of removable complete denture, maxillary .....	No Cost
D9933	Cleaning and inspection of removable complete denture, mandibular .....	No Cost
D9934	Cleaning and inspection of removable partial denture, maxillary .....	No Cost
D9935	Cleaning and inspection of removable partial denture, mandibular .....	No Cost
D9940	Occlusal guard, by report - <i>limited to 1 in 3 years</i> .....	\$105.00
D9943	Occlusal guard adjustment .....	\$10.00



**Plan CA12A      DeltaCare USA      Description of Benefits and Copayments**

D9951	Occlusal adjustment, limited .....	\$50.00
D9952	Occlusal adjustment, complete .....	\$70.00
D9975	External bleaching for home application, per arch; includes materials and fabrication of custom trays - <i>limited to one bleaching tray and gel for two weeks of self-treatment</i> .....	\$125.00
D9986	Missed appointment - <i>without 24 hour notice - per 15 minutes of appointment time - up to an overall maximum of \$40.00</i> .....	\$10.00
D9987	Canceled appointment - <i>without 24 hour notice - per 15 minutes of appointment time - up to an overall maximum of \$40.00</i> .....	\$10.00

If services for a listed procedure are performed by the assigned Contract Dentist, the Enrollee pays the specified Copayment. Listed procedures which require a Dentist to provide Specialist Services, and are referred by the assigned Contract Dentist, must be authorized by Delta Dental. The Enrollee pays the Copayment specified for such services.

Procedures not listed above are not covered, however, may be available at the Contract Dentist's "filed fees." "Filed fees" means the Contract Dentist's fees on file with Delta Dental. Questions regarding these fees should be directed to the Customer Service department at 800-422-4234.

**SCHEDULE B****Limitations of Benefits**

1. The frequency of certain Benefits is limited. All frequency limitations are listed in *Schedule A, Description of Benefits and Copayments*.
2. If the Enrollee accepts a treatment plan from the Contract Dentist that includes any combination of more than six crowns, bridge pontics and/or bridge retainers, the Enrollee may be charged an additional \$100.00 above the listed Copayment for each of these services after the sixth unit has been provided.
3. General anesthesia and/or intravenous sedation/analgesia is limited to treatment by a contracted oral surgeon and in conjunction with an approved referral for the removal of one or more partial or full bony impactions, (Procedures D7230, D7240, and D7241).
4. Benefits provided by a pediatric Dentist are limited to children through age seven following an attempt by the assigned Contract Dentist to treat the child and upon prior authorization by Delta Dental, less applicable Copayments. Exceptions for medical conditions, regardless of age limitation, will be considered on an individual basis.
5. The cost to an Enrollee receiving orthodontic treatment whose coverage is cancelled or terminated for any reason will be based on the Contract Orthodontist's usual fee for the treatment plan. The Contract Orthodontist will prorate the amount for the number of months remaining to complete treatment. The Enrollee makes payment directly to the Contract Orthodontist as arranged.
6. Orthodontic treatment in progress is limited to new DeltaCare USA Enrollees who, at the time of their original effective date, are in active treatment started under their previous employer sponsored dental plan, as long as they continue to be eligible under the DeltaCare USA Program. Active treatment means tooth movement has begun. Enrollees are responsible for all Copayments and fees subject to the provisions of their prior dental plan. Delta Dental is financially responsible only for amounts unpaid by the prior dental plan for qualifying orthodontic cases.

**Exclusions of Benefits**

1. Any procedure that is not specifically listed under *Schedule A, Description of Benefits and Copayments*.
2. Any procedure that in the professional opinion of the Contract Dentist:
  - a. has poor prognosis for a successful result and reasonable longevity based on the condition of the tooth or teeth and/or surrounding structures, **or**
  - b. is inconsistent with generally accepted standards for dentistry.
3. Services solely for cosmetic purposes, with the exception of procedure D9975 (External bleaching for home application, per arch), or for conditions that are a result of hereditary or developmental defects, such as cleft palate, upper and lower jaw malformations, congenitally missing teeth and teeth that are discolored or lacking enamel, except for the treatment of newborn children with congenital defects or birth abnormalities.
4. Porcelain crowns, porcelain fused to metal, cast metal or resin with metal type crowns and fixed partial dentures (bridges) for children under 16 years of age.
5. Lost or stolen appliances including, but not limited to, full or partial dentures, space maintainers, crowns and fixed partial dentures (bridges).
6. Procedures, appliances or restoration if the purpose is to change vertical dimension, or to diagnose or treat abnormal conditions of the temporomandibular joint (TMJ).
7. Precious metal for removable appliances, metallic or permanent soft bases for complete dentures, porcelain denture teeth, precision abutments for removable partials or fixed partial dentures (overlays, implants, and appliances associated therewith) and personalization and characterization of complete and partial dentures.
8. Implant-supported dental appliances and attachments, implant placement, maintenance, removal and all other services associated with a dental implant.
9. Consultations for non-covered benefits.
10. Dental services received from any dental facility other than the assigned Contract Dentist, a preauthorized dental specialist, or a Contract Orthodontist except for *Emergency Services* as described in the Contract and/or Evidence of Coverage.
11. All related fees for admission, use, or stays in a hospital, out-patient surgery center, extended care facility, or other similar care facility.
12. Prescription drugs.

13. Dental expenses incurred in connection with any dental or orthodontic procedure started before the Enrollee's eligibility with the DeltaCare USA Program. Examples include: teeth prepared for crowns, root canals in progress, full or partial dentures for which an impression has been taken and orthodontics unless qualified for the orthodontic treatment in progress provision.
14. Lost, stolen or broken orthodontic appliances.
15. Changes in orthodontic treatment necessitated by accident of any kind.
16. Myofunctional and parafunctional appliances and/or therapies, with the exception of procedure D9940 (occlusal guard, per report).
17. Composite or ceramic brackets, lingual adaptation of orthodontic bands and other specialized or cosmetic alternatives to standard fixed and removable orthodontic appliances.
18. Treatment or appliances that are provided by a Dentist whose practice specializes in prosthodontic services.

### SmileWay® Wellness Program

Find all of our dental health resources, including a risk assessment tool, articles, videos and a free e-newsletter subscription, at: [mysmileway.com](https://mysmileway.com).

### DeltaCare USA Customer Service

800-422-4234

**NOTE: THIS IS ONLY A BRIEF SUMMARY OF THE PLAN.**

The Group Dental Service Contract must be consulted to determine the exact terms and conditions of coverage. An Evidence of Coverage will be sent to you upon enrollment. **If you wish to review an Evidence of Coverage prior to enrollment, you may request a copy by calling Customer Service at 800-422-4234.**

*In California, DeltaCare USA is underwritten by Delta Dental of California and administered by Delta Dental Insurance Company. These companies are financially responsible for their own products.*

**Customer Service**

800-422-4234  
Monday through Friday  
5 a.m. to 6 p.m., Pacific time

*Provided by:*

**Delta Dental of California**  
17871 Park Plaza Drive, Suite 200  
Cerritos, CA 90703

*Administered by:*

**Delta Dental Insurance Company**  
P.O. Box 1803  
Alpharetta, GA 30023



[deltadentalins.com/enrollees](https://deltadentalins.com/enrollees)





# VSP Vision

## Summary of Coverage

# A Look at Your VSP Vision Coverage

With VSP and CharterLIFE, your health comes first.



**As a member, you'll get access to savings and personalized vision care from a VSP network doctor for you and your family.**



### Value and savings you love.

Save on eyewear and eye care when you see a VSP network doctor. Plus, take advantage of Exclusive Member Extras which provide offers from VSP and leading industry brands totaling over \$3,000 in savings.

### Provider choices you want.

**vsp PREMIER edge** With thousands of choices, getting the most out of your benefits is easy at a VSP Premier Edge™ location.

### Shop online and connect your benefits.

**eyeconic** Eyeconic® is the preferred VSP online retailer where you can shop in-network with your vision benefits. See your savings in real time when you shop over 70 brands of contacts, eyeglasses, and sunglasses.

### Quality vision care you need.


You'll get great care from a VSP network doctor, including a WellVision Exam®. An annual eye exam not only helps you see well, but helps a doctor detect signs of eye conditions and health conditions, like diabetes and high blood pressure.

### Using your benefit is easy!

Create an account on **vsp.com** to view your in-network coverage, find the VSP network doctor who's right for you, and discover savings with exclusive member extras. At your appointment, just tell them you have VSP.

More Ways  
to Save

**Extra  
\$20**  
to spend on  
**Featured Frame Brands<sup>†</sup>**

bebe	Calvin Klein
COLE HAAN	DRAGON.
FLEXON	LONGCHAMP PARIS
	and more

See all brands and offers at **vsp.com/offers**.

**+**

**Up to  
40%**  
Savings on  
lens enhancements<sup>‡</sup>

Create an account today.  
Contact us: **800.877.7195** or **vsp.com**

## Your VSP Vision Benefits Summary

CharterLIFE and VSP provide you with an affordable vision plan.

**PROVIDER NETWORK:**

VSP Signature

**EFFECTIVE DATE:**

01/01/2024



BENEFIT	DESCRIPTION	COPAY	FREQUENCY
<b>Your Coverage with a VSP Provider</b>			
<b>WELLVISION EXAM</b>	<ul style="list-style-type: none"> <li>Focuses on your eyes and overall wellness</li> <li>Routine retinal screening</li> </ul>	\$10 Up to \$39	Every calendar year
<b>ESSENTIAL MEDICAL EYE CARE</b>	<ul style="list-style-type: none"> <li>Retinal imaging for members with diabetes covered-in-full</li> <li>Additional exams and services beyond routine care to treat immediate issues from pink eye to sudden changes in vision or to monitor ongoing conditions such as dry eye, diabetic eye disease, glaucoma, and more.</li> <li>Coordination with your medical coverage may apply. Ask your VSP network doctor for details.</li> </ul>	\$20 per exam	Available as needed
<b>PRESCRIPTION GLASSES</b>		<b>\$25</b>	See frame and lenses
<b>FRAME*</b>	<ul style="list-style-type: none"> <li>\$220 Featured Frame Brands allowance</li> <li>\$200 frame allowance</li> <li>20% savings on the amount over your allowance</li> <li>\$110 Walmart/Sam's Club/Costco frame allowance</li> </ul>	Included in Prescription Glasses	Every calendar year
<b>LENSES</b>	<ul style="list-style-type: none"> <li>Single vision, lined bifocal, and lined trifocal lenses</li> </ul>	Included in Prescription Glasses	Every calendar year
<b>LENS ENHANCEMENTS</b>	<ul style="list-style-type: none"> <li>Standard progressive lenses</li> <li>Premium progressive lenses</li> <li>Custom progressive lenses</li> <li>Impact-resistant lenses</li> <li>UV protection</li> <li>Average savings of 40% on other lens enhancements</li> </ul>	\$0 \$80 - \$90 \$120 - \$160 \$0 \$0	Every calendar year
<b>CONTACTS (INSTEAD OF GLASSES)</b>	<ul style="list-style-type: none"> <li>\$150 allowance for contacts; copay does not apply</li> <li>Contact lens exam (fitting and evaluation)</li> </ul>	Up to \$60	Every calendar year
<b>ADDITIONAL SAVINGS</b>	<b>Glasses and Sunglasses</b> <ul style="list-style-type: none"> <li>Discover all current eyewear offers and savings at <a href="https://vsp.com/offers">vsp.com/offers</a>.</li> <li>30% savings on unlimited additional pairs of prescription or non-prescription glasses/sunglasses, including lens enhancements, from the same VSP provider on the same day as your WellVision Exam. Or get 20% savings from a VSP provider within 12 months of your last WellVision Exam.</li> </ul>		
	<b>Laser Vision Correction</b> <ul style="list-style-type: none"> <li>Average of 15% off the regular price; discounts available at contracted facilities.</li> <li>After surgery, use your frame allowance (if eligible) for sunglasses from any VSP doctor</li> </ul>		
	<b>Exclusive Member Extras for VSP Members</b> <ul style="list-style-type: none"> <li>Contact lens rebates, lens satisfaction guarantees, and more offers at <a href="https://vsp.com/offers">vsp.com/offers</a>.</li> <li>Save up to 60% on digital hearing aids with TruHearing®. Visit <a href="https://vsp.com/offers/special-offers/hearing-aids">vsp.com/offers/special-offers/hearing-aids</a> for details.</li> <li>Enjoy everyday savings on health, wellness, and more with VSP Simple Values.</li> </ul>		

**YOUR COVERAGE GOES FURTHER IN-NETWORK**

With so many in-network choices, VSP makes it easy to get the most out of your benefits. You'll have access to preferred private practice, retail, and online in-network choices. Log in to [vsp.com](https://vsp.com) to find an in-network provider.

\*Only available to VSP members with applicable plan benefits. Frame brands and promotions are subject to change.

†Savings based on doctor's retail price and vary by plan and purchase selection; average savings determined after benefits are applied. Ask your VSP network doctor for more details.

+Coverage with a retail chain may be different or not apply.

VSP guarantees member satisfaction from VSP providers only. Coverage information is subject to change. In the event of a conflict between this information and your organization's contract with VSP, the terms of the contract will prevail. Based on applicable laws, benefits may vary by location. In the state of Washington, VSP Vision Care, Inc., is the legal name of the corporation through which VSP does business. TruHearing is not available directly from VSP in the states of California and Washington. Premier Edge is not available for some members in the state of Texas.

To learn about your privacy rights and how your protected health information may be used, see the VSP Notice of Privacy Practices on [vsp.com](https://vsp.com).

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# UNUM

## Group Life Insurance and AD&D



## Term Life with Accidental Death & Dismemberment (AD&D) Insurance can provide money for your family if you die or are diagnosed with a terminal illness.

### How does it work?

You keep coverage for a set period of time, or "term." If you die during that term, the money can help your family pay for basic living expenses, final arrangements, tuition and more.

AD&D Insurance is also available, which can pay a benefit if you survive an accident but have certain serious injuries. It can pay an additional amount if you die from a covered accident.

### Why choose Unum?

Your employer is offering you this coverage at no cost to you. Unum is the leading provider of employee benefits, with more than 165 years of experience.<sup>1</sup> We'll be there to back our benefits and provide you with the support you need.

### Who can get Term Life coverage?

If you are actively at work at least 30 hours per week, you can receive coverage for:

<b>You</b>	You can receive a benefit amount of \$50,000.
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### Who can get Accidental Death & Dismemberment (AD&D) coverage?

<b>You</b>	You can receive an AD&D benefit amount of \$50,000.
------------	---

No questions or health exams required for AD&D coverage.

### What else is included?

#### A "Living" Benefit

If you are diagnosed with a terminal illness with less than 12 months to live, you can request 75% of your life insurance benefit (up to \$500,000) while you are still living. This amount will be taken out of the death benefit and may be taxable.

#### Waiver of premium

Your cost may be waived if you are totally disabled for a period of time.

#### Portability

You may be able to keep coverage if you leave the company, retire or change the number of hours you work.

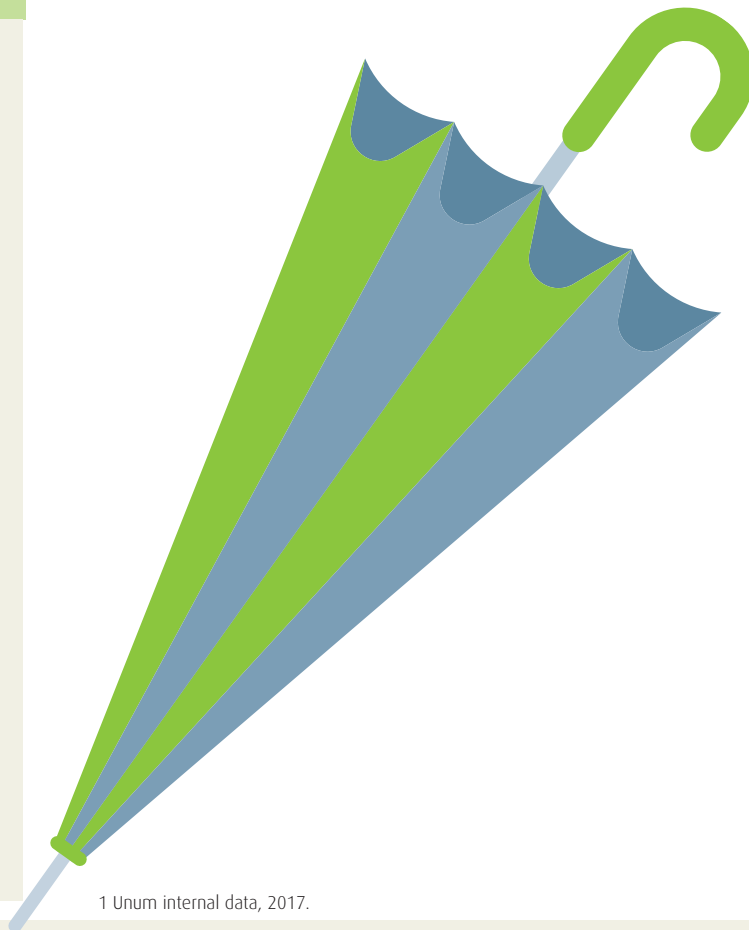
Employees or dependents who have a sickness or injury having a material effect on life expectancy at the time their group coverage ends are not eligible for portability.

#### Work-life balance Employee Assistance Program (EAP)

Get access to professional help for a range of personal and work-related issues, including counselor referrals, financial planning and legal support.

#### Worldwide emergency travel assistance

One phone call gets you and your family immediate help anywhere in the world, as long as you're traveling 100 or more miles from home. However, a spouse traveling on business for his or her employer is not covered.



<sup>1</sup> Unum internal data, 2017.

## Term Life Insurance with Accidental Death & Dismemberment (AD&D)

### Exclusions and limitations

#### Actively at work

Eligible employees must be actively at work to apply for coverage. Being actively at work means on the day the employee applies for coverage, the individual must be working at one of his/her company's business locations; or the individual must be working at a location where he/she is required to represent the company. If applying for coverage on a day that is not a scheduled workday, the employee will be considered actively at work as of his/her last scheduled workday. Employees are not considered actively at work if they are on a leave of absence or lay off.

Employees must be U.S. citizens or legally authorized to work in the U.S. to receive coverage.

Employees must be actively employed in the United States with the Employer to receive coverage. Employees must be insured under the plan for spouses and dependents to be eligible for coverage.

#### Exclusions and limitations

Life insurance benefits will not be paid for deaths caused by suicide occurring within 24 months after the effective date of coverage. The same applies for increased or additional benefits.

#### AD&D specific exclusions and limitations:

Accidental death and dismemberment benefits will not be paid for losses caused by, contributed to by, or resulting from:

- Disease of the body; diagnostic, medical or surgical treatment or mental disorder as set forth in the latest edition of the Diagnostic and Statistical Manual of Mental Disorders (DSM)
- Suicide, self-destruction while sane, intentionally self-inflicted injury while sane or self-inflicted injury while insane
- War, declared or undeclared, or any act of war
- Active participation in a riot
- Committing or attempting to commit a crime under state or federal law
- The voluntary use of any prescription or non-prescription drug, poison, fume or other chemical substance unless used according to the prescription or direction of your doctor. This exclusion does not apply to you if the chemical substance is ethanol.
- Intoxication – "Being intoxicated" means your blood alcohol level equals or exceeds the legal limit for operating a motor vehicle in the state or jurisdiction where the accident occurred.

#### Delayed effective date of coverage

Employee: Insurance coverage will be delayed if you are not in active employment because of an injury, sickness, temporary layoff, or leave of absence on the date that insurance would otherwise become effective.

#### Age reduction

Coverage amounts for Life and AD&D Insurance for you will reduce to 65% of the original amount when you reach age 70, and will reduce to 50% of the original amount when you reach age 75. Coverage may not be increased after a reduction.

#### Termination of coverage

Your coverage under the policy ends on the earliest of:

- The date the policy or plan is cancelled
- The date you no longer are in an eligible group
- The date your eligible group is no longer covered
- The last day of the period for which you made any required contributions
- The last day you are actively employed (unless coverage is continued due to a covered layoff, leave of absence, injury or sickness), as described in the certificate of coverage

This information is not intended to be a complete description of the insurance coverage available. The policy or its provisions may vary or be unavailable in some states. The policy has exclusions and limitations which may affect any benefits payable. For complete details of coverage and availability, please refer to Policy Form C.FP-1 et al or contact your Unum representative.

Life Planning Financial & Legal Resources services, provided by HealthAdvocate, are available with select Unum insurance offerings. Terms and availability of service are subject to change. Service provider does not provide legal advice; please consult your attorney for guidance. Services are not valid after coverage terminates. Please contact your Unum representative for details.

#### Work-life balance EAP

The work-life balance employee assistance program, provided by HealthAdvocate, is available with select unum insurance offerings. Terms and availability of service are subject to change. Service provider does not provide legal advice; please consult your attorney for guidance. Services are not valid after coverage terminates. Please contact your Unum representative for details.

#### Worldwide emergency travel assistance

Worldwide emergency travel assistance services, provided by Assist America, Inc., are available with select Unum insurance offerings. Terms and availability of service are subject to chance and prior notification requirements. Services are not valid after coverage

terminates. Please contact your Unum representative for details.

Underwritten by:

Unum Life Insurance Company of America, Portland, Maine

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## Term Life with Accidental Death & Dismemberment (AD&D) Insurance can provide money for your family if you die or are diagnosed with a terminal illness.

### How does it work?

You keep coverage for a set period of time, or "term." If you die during that term, the money can help your family pay for basic living expenses, final arrangements, tuition and more.

AD&D Insurance is also available, which can pay a benefit if you survive an accident but have certain serious injuries. It can pay an additional amount if you die from a covered accident.

### Why choose Unum?

Your employer is offering you this coverage at no cost to you. Unum is the leading provider of employee benefits, with more than 165 years of experience.<sup>1</sup> We'll be there to back our benefits and provide you with the support you need.

### Who can get Term Life coverage?

If you are actively at work at least 30 hours per week, you can receive coverage for:

<b>You</b>	You can receive a benefit amount of \$25,000.
------------	---

### Who can get Accidental Death & Dismemberment (AD&D) coverage?

<b>You</b>	You can receive an AD&D benefit amount of \$25,000.
------------	---

No questions or health exams required for AD&D coverage.

### What else is included?

#### A "Living" Benefit

If you are diagnosed with a terminal illness with less than 12 months to live, you can request 75% of your life insurance benefit (up to \$500,000) while you are still living. This amount will be taken out of the death benefit and may be taxable.

#### Waiver of premium

Your cost may be waived if you are totally disabled for a period of time.

#### Portability

You may be able to keep coverage if you leave the company, retire or change the number of hours you work.

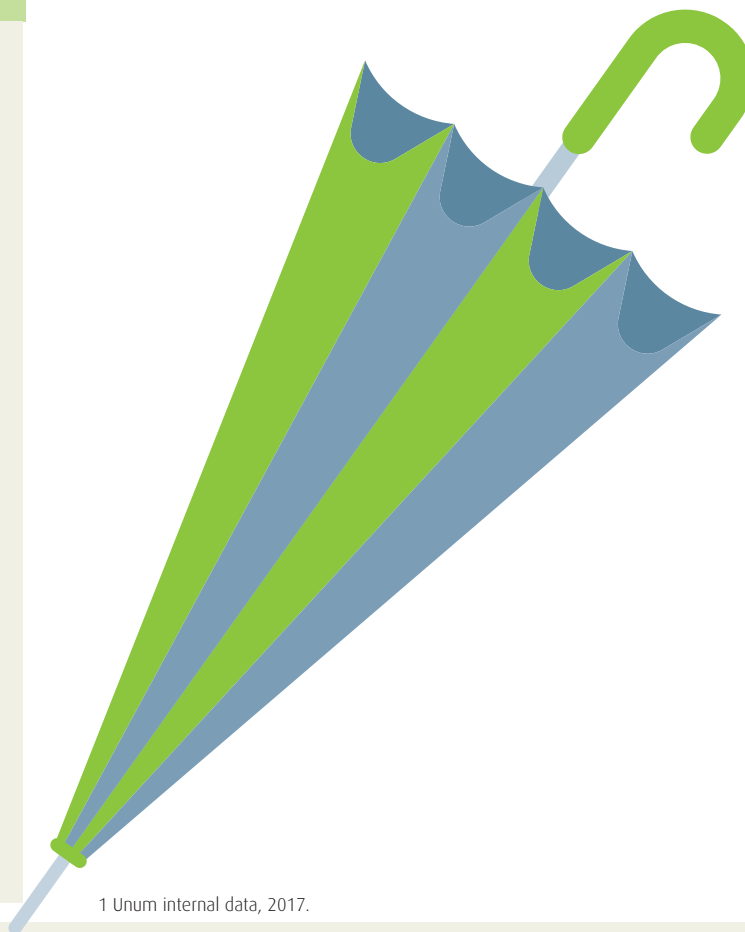
Employees or dependents who have a sickness or injury having a material effect on life expectancy at the time their group coverage ends are not eligible for portability.

#### Work-life balance Employee Assistance Program (EAP)

Get access to professional help for a range of personal and work-related issues, including counselor referrals, financial planning and legal support.

#### Worldwide emergency travel assistance

One phone call gets you and your family immediate help anywhere in the world, as long as you're traveling 100 or more miles from home. However, a spouse traveling on business for his or her employer is not covered.



<sup>1</sup> Unum internal data, 2017.

## Term Life Insurance with Accidental Death & Dismemberment (AD&D)

### Exclusions and limitations

#### Actively at work

Eligible employees must be actively at work to apply for coverage. Being actively at work means on the day the employee applies for coverage, the individual must be working at one of his/her company's business locations; or the individual must be working at a location where he/she is required to represent the company. If applying for coverage on a day that is not a scheduled workday, the employee will be considered actively at work as of his/her last scheduled workday. Employees are not considered actively at work if they are on a leave of absence or lay off.

Employees must be U.S. citizens or legally authorized to work in the U.S. to receive coverage.

Employees must be actively employed in the United States with the Employer to receive coverage. Employees must be insured under the plan for spouses and dependents to be eligible for coverage.

#### Exclusions and limitations

Life insurance benefits will not be paid for deaths caused by suicide occurring within 24 months after the effective date of coverage. The same applies for increased or additional benefits.

#### AD&D specific exclusions and limitations:

Accidental death and dismemberment benefits will not be paid for losses caused by, contributed to by, or resulting from:

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- War, declared or undeclared, or any act of war
- Active participation in a riot
- Committing or attempting to commit a crime under state or federal law
- The voluntary use of any prescription or non-prescription drug, poison, fume or other chemical substance unless used according to the prescription or direction of your doctor. This exclusion does not apply to you if the chemical substance is ethanol.
- Intoxication – "Being intoxicated" means your blood alcohol level equals or exceeds the legal limit for operating a motor vehicle in the state or jurisdiction where the accident occurred.

#### Delayed effective date of coverage

Employee: Insurance coverage will be delayed if you are not in active employment because of an injury, sickness, temporary layoff, or leave of absence on the date that insurance would otherwise become effective.

#### Age reduction

Coverage amounts for Life and AD&D Insurance for you will reduce to 65% of the original amount when you reach age 70, and will reduce to 50% of the original amount when you reach age 75. Coverage may not be increased after a reduction.

#### Termination of coverage

Your coverage under the policy ends on the earliest of:

- The date the policy or plan is cancelled
- The date you no longer are in an eligible group
- The date your eligible group is no longer covered
- The last day of the period for which you made any required contributions
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## Term Life with Accidental Death & Dismemberment (AD&D) Insurance can provide money for your family if you die or are diagnosed with a terminal illness.

### How does it work?

You keep coverage for a set period of time, or “term.” If you die during that term, the money can help your family pay for basic living expenses, final arrangements, tuition and more.

AD&D Insurance is also available, which can pay a benefit if you survive an accident but have certain serious injuries. It can pay an additional amount if you die from a covered accident.

### Why choose Unum?

Your employer is offering you this coverage at no cost to you. Unum is the leading provider of employee benefits, with more than 165 years of experience.<sup>1</sup> We’ll be there to back our benefits and provide you with the support you need.

### Who can get Term Life coverage?

If you are actively at work at least 30 hours per week, you can receive coverage for:

<b>You</b>	You can receive 2 times your earnings up to a maximum of \$150,000. You can get up to \$150,000 with no health questions.
------------	--

### Who can get Accidental Death & Dismemberment (AD&D) coverage?

<b>You</b>	You can get 2 times your earnings of AD&D coverage up to a maximum of \$150,000.
------------	--

No questions or health exams required for AD&D coverage.

### What else is included?

#### A “Living” Benefit

If you are diagnosed with a terminal illness with less than 12 months to live, you can request 75% of your life insurance benefit (up to \$500,000) while you are still living. This amount will be taken out of the death benefit and may be taxable.

#### Waiver of premium

Your cost may be waived if you are totally disabled for a period of time.

#### Portability

You may be able to keep coverage if you leave the company, retire or change the number of hours you work.

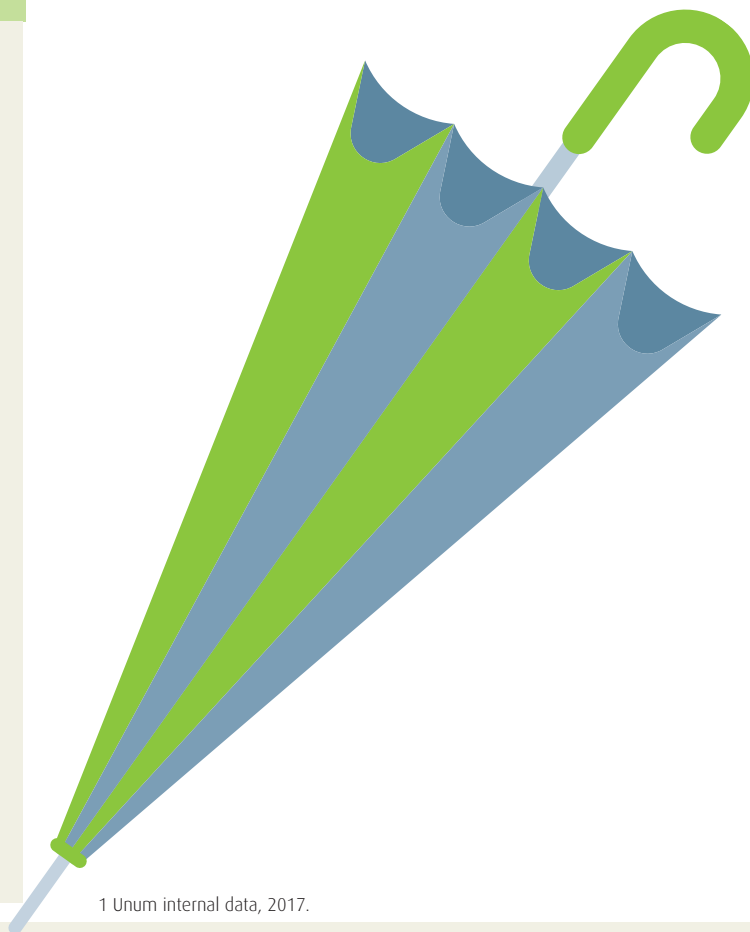
Employees or dependents who have a sickness or injury having a material effect on life expectancy at the time their group coverage ends are not eligible for portability.

#### Work-life balance Employee Assistance Program (EAP)

Get access to professional help for a range of personal and work-related issues, including counselor referrals, financial planning and legal support.

#### Worldwide emergency travel assistance

One phone call gets you and your family immediate help anywhere in the world, as long as you’re traveling 100 or more miles from home. However, a spouse traveling on business for his or her employer is not covered.



1 Unum internal data, 2017.

## Term Life Insurance with Accidental Death & Dismemberment (AD&D)

### Exclusions and limitations

#### Actively at work

Eligible employees must be actively at work to apply for coverage. Being actively at work means on the day the employee applies for coverage, the individual must be working at one of his/her company's business locations; or the individual must be working at a location where he/she is required to represent the company. If applying for coverage on a day that is not a scheduled workday, the employee will be considered actively at work as of his/her last scheduled workday. Employees are not considered actively at work if they are on a leave of absence or lay off.

Employees must be U.S. citizens or legally authorized to work in the U.S. to receive coverage.

Employees must be actively employed in the United States with the Employer to receive coverage. Employees must be insured under the plan for spouses and dependents to be eligible for coverage.

#### Exclusions and limitations

Life insurance benefits will not be paid for deaths caused by suicide occurring within 24 months after the effective date of coverage. The same applies for increased or additional benefits.

#### AD&D specific exclusions and limitations:

Accidental death and dismemberment benefits will not be paid for losses caused by, contributed to by, or resulting from:

- Disease of the body; diagnostic, medical or surgical treatment or mental disorder as set forth in the latest edition of the Diagnostic and Statistical Manual of Mental Disorders (DSM)
- Suicide, self-destruction while sane, intentionally self-inflicted injury while sane or self-inflicted injury while insane
- War, declared or undeclared, or any act of war
- Active participation in a riot
- Committing or attempting to commit a crime under state or federal law
- The voluntary use of any prescription or non-prescription drug, poison, fume or other chemical substance unless used according to the prescription or direction of your doctor. This exclusion does not apply to you if the chemical substance is ethanol.
- Intoxication – "Being intoxicated" means your blood alcohol level equals or exceeds the legal limit for operating a motor vehicle in the state or jurisdiction where the accident occurred.

#### Delayed effective date of coverage

Employee: Insurance coverage will be delayed if you are not in active employment because of an injury, sickness, temporary layoff, or leave of absence on the date that insurance would otherwise become effective.

#### Age reduction

Coverage amounts for Life and AD&D Insurance for you will reduce to 65% of the original amount when you reach age 70, and will reduce to 50% of the original amount when you reach age 75. Coverage may not be increased after a reduction.

#### Termination of coverage

Your coverage under the policy ends on the earliest of:

- The date the policy or plan is cancelled
- The date you no longer are in an eligible group
- The date your eligible group is no longer covered
- The last day of the period for which you made any required contributions
- The last day you are actively employed (unless coverage is continued due to a covered layoff, leave of absence, injury or sickness), as described in the certificate of coverage

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#### Work-life balance EAP

The work-life balance employee assistance program, provided by HealthAdvocate, is available with select unum insurance offerings. Terms and availability of service are subject to change. Service provider does not provide legal advice; please consult your attorney for guidance. Services are not valid after coverage terminates. Please contact your Unum representative for details.

#### Worldwide emergency travel assistance

Worldwide emergency travel assistance services, provided by Assist America, Inc., are available with select Unum insurance offerings. Terms and availability of service are subject to chance and prior notification requirements. Services are not valid after coverage

terminates. Please contact your Unum representative for details.

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# Voluntary Plans



# UNUM

## Voluntary Life Insurance and AD&D



## Term Life and Accidental Death & Dismemberment (AD&D) Insurance

can provide money for your family if you die or are diagnosed with a terminal illness.

### How does it work?

You choose the amount of coverage that's right for you, and you keep coverage for a set period of time, or "term." If you die during that term, the money can help your family pay for basic living expenses, final arrangements, tuition and more.

AD&D Insurance is also available, which pays a benefit if you survive an accident but have certain serious injuries. It pays an additional amount if you die from a covered accident.

### Why is this coverage so valuable?

If you previously purchased coverage, you can increase it up to \$200,000 to meet your growing needs — with no health questions or exams.

### Who can get Term Life coverage?

If you are actively at work at least 20 hours per week, you may apply for coverage for:

<b>You</b>	Choose from \$10,000 to \$500,000 in \$10,000 increments, up to 5 times your earnings.  If you previously purchased coverage, you can increase it up to \$200,000, your guaranteed issue amount, with no health questions. If you previously declined coverage, you may have to answer some health questions.
<b>Your Spouse</b>	Get up to \$100,000 of coverage in \$50,000 increments. Spouse coverage cannot exceed 100% of the coverage amount you purchase for yourself.  If you previously purchased coverage for your spouse, they can increase their coverage up to \$50,000, their guaranteed issue amount, with no health questions or exams, if eligible (see delayed effective date). If you previously declined spouse coverage, some health questions may be required.
<b>Your Children</b>	Get up to \$10,000 of coverage in \$2,000 increments if eligible (see delayed effective date). One policy covers all of your children until their 26th birthday.  The maximum benefit for children live birth to 6 months is \$1,000.

### What else is included?

#### A "Living" Benefit

If you are diagnosed with a terminal illness with less than 12 months to live, you can request 100% of your life insurance benefit (up to \$250,000) while you are still living. This amount will be taken out of the death benefit. These benefit payments may adversely affect the recipient's eligibility for Medicaid or other government benefits or entitlement, and may be taxable. Recipients should consult their tax attorney or advisor before utilizing living benefit payments.

#### Waiver of premium

Your cost may be waived if you are totally disabled for a period of time.

#### Portability

You may be able to keep coverage if you leave the company, retire or change the number of hours you work.

Employees or dependents who have a sickness or injury having a material effect on life expectancy at the time their group coverage ends are not eligible for portability.

### Who can get Accidental Death & Dismemberment (AD&D) coverage?

<b>You:</b>	Get up to \$500,000 of AD&D coverage for yourself in \$10,000 increments to a maximum of 5 times your earnings.
<b>Your Spouse:</b>	Get up to \$100,000 of AD&D coverage for your spouse in \$5,000 increments, if eligible (see delayed effective date).
<b>Your Children:</b>	Get up to \$10,000 of coverage for your children in \$2,000 increments if eligible (see delayed effective date).

No questions or health exams required for AD&D coverage. Delayed Effective Date: If your spouse or child has a serious injury, sickness, or disorder, or is confined, their coverage may not take effect. Payment of premium does not guarantee coverage. Please refer to your policy contract or see your plan administrator for an explanation of the delayed effective date provision that applies to your plan.

## Term Life and Accidental Death & Dismemberment (AD&D) Insurance

### How much coverage can I get?

#### Calculate your costs

1. Enter the coverage amount you want.
2. Divide by the amount shown.
3. Multiply by the rate. Use the rate table (at right) to find the rate based on age.

(Choose the age you will be when your coverage becomes effective. To determine your spouse rate, choose the age the spouse will be when coverage becomes effective. See your plan administrator for your plan effective date.)

4. Enter your cost.

	1	2	3	4
Employee	\$_____,000	÷ \$1,000 = \$_____	X \$_____	= \$_____
Spouse	\$_____,000	÷ \$1,000 = \$_____	X \$_____	= \$_____
Child	\$_____,000	÷ \$1,000 = \$_____	X \$_____	= \$_____
<b>Total cost</b>				

Employee monthly rate		Spouse monthly rate	Child monthly rate
Age	Per \$1,000 of coverage	Per \$1,000 of coverage	\$0.160 per \$1,000 of coverage
	Cost	Cost	
15-24	\$0.070	\$0.070	
25-29	\$0.070	\$0.070	
30-34	\$0.080	\$0.080	
35-39	\$0.100	\$0.100	
40-44	\$0.150	\$0.150	
45-49	\$0.260	\$0.260	
50-54	\$0.430	\$0.043	
55-59	\$0.680	\$0.680	
60-64	\$1.060	\$1.060	
65-69	\$1.900	\$1.900	
70-74	\$3.390	\$3.390	
75+	\$5.600	\$5.600	

1. Enter the AD&D coverage amount you want.
2. Divide by the amount shown.
3. Multiply by the rate. Use the AD&D rate table (at right) to find the rate.
4. Enter your cost.

AD&D	1	2	3	4
Employee	\$_____,000	÷ \$1,000 = \$_____	X \$0.020	= \$_____
Spouse	\$_____,000	÷ \$1,000 = \$_____	X \$0.020	= \$_____
Child	\$_____,000	÷ \$1,000 = \$_____	X \$0.020	= \$_____
<b>Total cost</b>				

AD&D monthly rates		
	Coverage amount	Rate
Employee	per \$1,000 of coverage	\$0.020
Spouse	per \$1,000 of coverage	\$0.020
Child	per \$1,000 of coverage	\$0.020

Billed amount may vary slightly.

If you apply for coverage above the guaranteed issue amount, you will be asked health-related questions which may affect your ability to get the larger coverage amount. In order to purchase coverage for your dependents, you must buy coverage for yourself. Coverage amounts cannot exceed 100% of your coverage amounts.

## Term Life and Accidental Death & Dismemberment (AD&D) Insurance

### Exclusions and limitations

#### Actively at work

Eligible employees must be actively at work to apply for coverage. Being actively at work means on the day the employee applies for coverage, the individual must be working at one of his/her company's business locations; or the individual must be working at a location where he/she is required to represent the company. If applying for coverage on a day that is not a scheduled workday, the employee will be considered actively at work as of his/her last scheduled workday. Employees are not considered actively at work if they are on a leave of absence or lay off.

An unmarried handicapped dependent child who becomes handicapped prior to the child's attainment age of 26 may be eligible for benefits. Please see your plan administrator for details on eligibility.

Employees must be U.S. citizens or legally authorized to work in the U.S. to receive coverage. Spouses and dependents must live in the U.S. to receive coverage.

Employees must be actively employed in the United States with the Employer to receive coverage. Employees must be insured under the plan for spouses and dependents to be eligible for coverage.

#### Exclusions and limitations

Life insurance benefits will not be paid for deaths caused by suicide occurring within 24 months after the effective date of coverage. The same applies for increased or additional benefits.

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- Committing or attempting to commit a crime under state or federal law
- The voluntary use of any prescription or non-prescription drug, poison, fume or other chemical substance unless used according to the prescription or direction of your or your dependent's doctor. This exclusion does not apply to you or your dependent if the chemical substance is ethanol.
- Intoxication – "Being intoxicated" means your or your dependent's blood alcohol level equals or exceeds the legal limit for operating a motor vehicle in the state or jurisdiction where the accident occurred.

#### Delayed effective date of coverage

Insurance coverage will be delayed if you are not an active employee because of an injury, sickness, temporary layoff, or leave of absence on the date that insurance would otherwise become effective.

Delayed Effective Date: If your spouse or child has a serious injury, sickness, or disorder, or is confined, their coverage may not take effect. Payment of premium does not guarantee coverage. Please refer to your policy contract or see your plan administrator for an explanation of the delayed effective date provision that applies to your plan.

#### Age reduction

Coverage amounts for Life and AD&D Insurance for you and your dependents will reduce to:

- 65% of the original amount when you reach age 70
- 50% of the original amount when you reach age 75
- 25% of the original amount when you reach age 85

#### Termination of coverage

Your coverage and your dependents' coverage under the policy ends on the earliest of:

- The date the policy or plan is cancelled
- The date you no longer are in an eligible group
- The date your eligible group is no longer covered
- The last day of the period for which you made any required contributions
- The last day you are actively employed (unless coverage is continued due to a covered layoff, leave of absence, injury or sickness), as described in the certificate of coverage

In addition, coverage for any one dependent will end on the earliest of:

- The date your coverage under a plan ends
- The date your dependent ceases to be an eligible dependent
- For a spouse, the date of a divorce or annulment
- For dependents, the date of your death

Unum will provide coverage for a payable claim that occurs while you and your dependents

are covered under the policy or plan.

This information is not intended to be a complete description of the insurance coverage available. The policy or its provisions may vary or be unavailable in some states. The policy has exclusions and limitations which may affect any benefits payable. For complete details of coverage and availability, please refer to Policy Form C.FP-1 et al or contact your Unum representative.

Life Planning Financial & Legal Resources services, provided by HealthAdvocate, are available with select Unum insurance offerings. Terms and availability of service are subject to change. Service provider does not provide legal advice; please consult your attorney for guidance.

Services are not valid after coverage terminates. Please contact your Unum representative for details.

Unum complies with state civil union and domestic partner laws when applicable.

Underwritten by:

Unum Life Insurance Company of America, Portland, Maine

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# Colonial Life

## Group Accident

# Group Accident Insurance



**You can't predict when or where an accident will strike. But you can make sure you have a safety net of financial protection to help if an accidental injury occurs.**

Accidents can happen anytime, anywhere—at home or at work, on the playground or on the road. Some of the most common injuries include:

- Broken bones
- Burns
- Concussions
- Lacerations
- Back or knee injuries
- Accidental injuries that send you to the Emergency Room, Urgent Care or a doctor's office.

Colonial Life's Group Accident Insurance helps you fill some of the gaps caused by increasing deductibles, co-payments and out-of-pocket costs related to an accidental injury. With this coverage you may not need to use your savings or secure a loan to help pay those unexpected out-of-pocket expenses associated with a covered accident.

## Here's how it works...

Imagine while cleaning the gutters, you fall from the ladder and break your leg.

### These are out-of-pocket expenses you may encounter:

<b>\$100</b>	Emergency room co-pay
<b>\$250</b>	Deductible (co-pays do not count toward deductible)
<b>\$35</b>	Specialist visit co-pay – orthopedic physician
<b>\$350</b>	Specialist visit co-pay – occupational/physical therapy for 10 days

---

**\$735      Out-of-pocket expenses**

### And here is a sample of benefits you may be eligible for with Colonial Life's Group Accident Insurance:

<b>\$75</b>	Accident Emergency Treatment
<b>\$100</b>	Accident Follow-up Doctor Visit (\$50 per visit, up to 2 per accident)
<b>\$50</b>	Appliance (crutches)
<b>\$675</b>	Fracture (broken leg)
<b>\$150</b>	Occupational/Physical Therapy (\$15/day for 10 days)
<b>\$20</b>	X-Ray (for diagnosis of broken leg)

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**\$1,070 of benefits paid to you in addition to other coverage you may have with other insurance companies.**

*The claims example above is based on a covered person age 41 who receives a complete fracture of the leg and requires non-surgical repair. The policy has exclusions and limitations. Costs of treatment and benefit amounts may vary.*



**Benefits listed are for each covered person per covered accident unless otherwise specified.**

**Initial Care**

- Accident Emergency Treatment .....\$75
- Air Ambulance.....\$1,000
- Ambulance .....\$100
- X-Ray.....\$20

**Common Accidental Injuries**

Dislocation (Separated Joint)	Non-Surgical	Surgical
Hip	\$1,800	\$3,600
Knee	\$900	\$1,800
Ankle – Bone or Bones of the Foot	\$720	\$1,440
Collarbone (sternoclavicular)	\$450	\$900
Lower Jaw, Shoulder, Elbow, Wrist	\$270	\$540
Bone or Bones of the Hand	\$270	\$540
Collarbone (acromioclavicular and separation)	\$90	\$180
One Toe or Finger	\$90	\$180

Fracture (Broken Bone)	Non-Surgical	Surgical
Depressed Skull	\$2,250	\$4,500
Non-Depressed Skull	\$900	\$1,800
Hip, Thigh	\$1,350	\$2,700
Body of Vertebrae, Pelvis, Leg	\$675	\$1,350
Bones of Face or Nose	\$315	\$630
Upper Jaw, Maxilla	\$315	\$630
Upper Arm between Elbow and Shoulder	\$315	\$630
Lower Jaw, Mandible; Kneecap, Ankle, Foot	\$270	\$540
Shoulder Blade, Collarbone, Vertebral Process	\$270	\$540
Forearm, Wrist, Hand	\$270	\$540
Rib	\$225	\$450
Coccyx	\$180	\$360
Finger, Toe	\$90	\$180

Your Colonial Life certificate also provides benefits for the following injuries received as a result of a covered accident.

- Burn (based on size and degree) .....\$750 to \$9,000
- Burn – Skin Graft for 2nd or 3rd degree burns .....50% of Burn benefit
- Coma..... \$5,000
- Concussion .....\$100
- Emergency Dental Work..... \$50 Extraction, \$150 Crown, Implant, or Denture
- Lacerations (based on size)..... \$25 to \$600

**Requires Surgery**

- Eye Injury.....\$200
- Ruptured Disc.....\$500
- Tendon/Ligament/Rotator Cuff ..... \$500 – one, \$750 – two or more
- Torn Knee Cartilage .....\$500

**Surgical Care**

- Blood/Plasma/Platelets.....\$300
- Surgery (arthroscopic or exploratory) .....\$100
- Surgery (cranial, open abdominal or thoracic)..... \$1,000
- Surgery (hernia) .....\$100

**Benefits listed are for each covered person per covered accident unless otherwise specified.**

**Transportation/Lodging Assistance**

If injured, the covered person must travel more than 50 miles from residence to receive special treatment and confinement in a hospital.

- Lodging (family member or companion) .....\$100 per night up to 30 days for a hotel/motel lodging costs
- Transportation .....\$400 per round trip up to 3 round trips

**Accident Hospital Care**

- Hospital Admission<sup>1</sup> ..... \$500 per accident
- Hospital ICU Admission<sup>1</sup> ..... \$750 per accident

<sup>1</sup> We will not pay the hospital admission benefit and the hospital intensive care unit (ICU) admission benefit for the same covered accident simultaneously.

- Hospital Confinement<sup>2</sup> ..... \$100 per day up to 365 days per accident
- Hospital ICU Confinement<sup>2</sup> ..... \$200 per day up to 15 days per accident

<sup>2</sup> We will not pay the hospital confinement benefit and the hospital ICU confinement benefit simultaneously.

**Accident Follow-Up Care**

- Accident Follow-Up Doctor Visit .....\$50 (up to 2 visits per accident)
- Appliances ..... \$50 (such as wheelchair, crutches)
- Medical Imaging Study..... \$100 per accident  
(limit 1 per covered accident and 1 per calendar year)
- Occupational or Physical Therapy.....\$15 per day up to 10 days
- Pain Management (Epidural Anesthesia)..... \$50 (limit 1 per covered accident)
- Prosthetic Devices/Artificial Limb .....\$500 – one, \$1,000 – two or more
- Rehabilitation Unit Confinement <sup>3</sup> .....\$50 per day up to 15 days per covered accident, and 30 days per calendar year

<sup>3</sup> We will not pay the hospital confinement benefit and the rehabilitation unit confinement benefit simultaneously.

**Accidental Dismemberment**

- Loss of Finger/Toe.....\$450 – one, \$900 – two or more
- Loss or Loss of Use of Hand/Foot/Sight of Eye.....\$4,500 – one, \$9,000 – two or more

**Catastrophic Accident**

For severe injuries that result in the total and irrecoverable:

- Loss of one hand and one foot
- Loss of both hands or both feet
- Loss or loss of use of one arm and one leg
- Loss or loss of use of both arms or both legs
- Loss of the sight of both eyes
- Loss of the hearing of both ears
- Loss of the ability to speak

Named Insured ..... \$25,000      Spouse .....\$25,000      Child(ren).....\$12,500

Six month elimination period. Payable once per lifetime for each covered person.

**Accidental Death**

	Accidental Death	Common Carrier
● Named Insured	\$20,000	\$80,000
● Spouse	\$20,000	\$80,000
● Child(ren)	\$4,000	\$16,000

### Will I have to answer health questions to receive coverage?

Coverage is Guaranteed Issue. No health questions will be asked.

### How do I know how much a benefit pays?

Benefit amounts are preset and not based on the medical expenses you are charged. You get a lump sum payment that is specific to the injury or treatment required.

### What additional features are included?

- Worldwide coverage
- Portable
- Compliant with Health Savings Account (HSA) guidelines

### Will my accident claim payment be reduced if I have other insurance?

You're paid regardless of any insurance you may have with other insurance companies, and the benefits are paid directly to you (unless you specify otherwise).

### How do I file a claim?

Visit [coloniallife.com](http://coloniallife.com) or call our Customer Service Department at 1-800-325-4368 for additional information.

## My Coverage Worksheet (For use with your Colonial Life benefits counselor)

### Who will be covered? (check one)

- Employee Only                       Employee & Spouse
- One-Parent Family                       Two-Parent Family

### When are covered accident benefits available? (check one)

- On and Off-Job Benefits                       Off-Job Only Benefits

### EXCLUSIONS AND LIMITATIONS

We will not pay any benefits for losses that are caused by, contributed to by or occur as a result of: felonies or illegal occupations; hazardous avocations; racing; semi-professional or professional sports; sickness; suicide or injuries which any covered person intentionally does to himself; war or armed conflict. In addition to the exclusions listed above, we also will not pay the Catastrophic Accident benefit for injuries that are caused by or are the consequence of: birth or intoxicants and narcotics. The covered person must incur a charge and the certificate must be in force for benefits to be payable.

For cost and complete details, see your Colonial Life benefits counselor. Applicable to policy number GACC1.0-P-CA and certificate number GACC1.0-C-CA. This is not an insurance contract and only the actual policy provisions will control.

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# Group Accident Insurance



**You can't predict when or where an accident will strike. But you can make sure you have a safety net of financial protection to help if an accidental injury occurs.**

Accidents can happen anytime, anywhere—at home or at work, on the playground or on the road. Some of the most common injuries include:

- Broken bones
- Burns
- Concussions
- Lacerations
- Back or knee injuries
- Accidental injuries that send you to the Emergency Room, Urgent Care or a doctor's office.

Colonial Life's Group Accident Insurance helps you fill some of the gaps caused by increasing deductibles, co-payments and out-of-pocket costs related to an accidental injury. With this coverage you may not need to use your savings or secure a loan to help pay those unexpected out-of-pocket expenses associated with a covered accident.

## Here's how it works...

Imagine while cleaning the gutters, you fall from the ladder and break your leg.

### These are out-of-pocket expenses you may encounter:

<b>\$100</b>	Emergency room co-pay
<b>\$250</b>	Deductible (co-pays do not count toward deductible)
<b>\$35</b>	Specialist visit co-pay – orthopedic physician
<b>\$350</b>	Specialist visit co-pay – occupational/physical therapy for 10 days

---

**\$735**      **Out-of-pocket expenses**

### And here is a sample of benefits you may be eligible for with Colonial Life's Group Accident Insurance:

<b>\$125</b>	Accident Emergency Treatment
<b>\$150</b>	Accident Follow-up Doctor Visit (\$50 per visit, up to 3 per accident)
<b>\$100</b>	Appliance (crutches)
<b>\$1,125</b>	Fracture (broken leg)
<b>\$250</b>	Occupational/Physical Therapy (\$25/day for 10 days)
<b>\$30</b>	X-Ray (for diagnosis of broken leg)

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**\$1,780 of benefits paid to you in addition to other coverage you may have with other insurance companies.**

*The claims example above is based on a covered person age 41 who receives a complete fracture of the leg and requires non-surgical repair. The policy has exclusions and limitations. Costs of treatment and benefit amounts may vary.*

**Benefits listed are for each covered person per covered accident unless otherwise specified.**

**Initial Care**

- Accident Emergency Treatment .....\$125
- Air Ambulance..... \$1,500
- Ambulance.....\$200
- X-Ray..... \$30

**Common Accidental Injuries**

Dislocation (Separated Joint)	Non-Surgical	Surgical
Hip	\$3,000	\$6,000
Knee	\$1,500	\$3,000
Ankle – Bone or Bones of the Foot	\$1,200	\$2,400
Collarbone (sternoclavicular)	\$750	\$1,500
Lower Jaw, Shoulder, Elbow, Wrist	\$450	\$900
Bone or Bones of the Hand	\$450	\$900
Collarbone (acromioclavicular and separation)	\$150	\$300
One Toe or Finger	\$150	\$300

Fracture (Broken Bone)	Non-Surgical	Surgical
Depressed Skull	\$3,750	\$7,500
Non-Depressed Skull	\$1,500	\$3,000
Hip, Thigh	\$2,250	\$4,500
Body of Vertebrae, Pelvis, Leg	\$1,125	\$2,250
Bones of Face or Nose	\$525	\$1,050
Upper Jaw, Maxilla	\$525	\$1,050
Upper Arm between Elbow and Shoulder	\$525	\$1,050
Lower Jaw, Mandible; Kneecap, Ankle, Foot	\$450	\$900
Shoulder Blade, Collarbone, Vertebral Process	\$450	\$900
Forearm, Wrist, Hand	\$450	\$900
Rib	\$375	\$750
Coccyx	\$300	\$600
Finger, Toe	\$150	\$300

Your Colonial Life certificate also provides benefits for the following injuries received as a result of a covered accident.

- Burn (based on size and degree) ..... \$1,000 to \$12,000
- Burn – Skin Graft for 2nd or 3rd degree burns .....50% of Burn benefit
- Coma.....\$10,000
- Concussion .....\$150
- Emergency Dental Work.....\$100 Extraction, \$300 Crown, Implant, or Denture
- Lacerations (based on size)..... \$25 to \$600

**Requires Surgery**

- Eye Injury.....\$300
- Ruptured Disc.....\$500
- Tendon/Ligament/Rotator Cuff ..... \$500 – one, \$750 – two or more
- Torn Knee Cartilage .....\$500

**Surgical Care**

- Blood/Plasma/Platelets.....\$300
- Surgery (arthroscopic or exploratory) .....\$150
- Surgery (cranial, open abdominal or thoracic)..... \$1,500
- Surgery (hernia) .....\$200

**Benefits listed are for each covered person per covered accident unless otherwise specified.**

**Transportation/Lodging Assistance**

If injured, the covered person must travel more than 50 miles from residence to receive special treatment and confinement in a hospital.

- Lodging (family member or companion) .....\$150 per night up to 30 days for a hotel/motel lodging costs
- Transportation .....\$500 per round trip up to 3 round trips

**Accident Hospital Care**

- Hospital Admission<sup>1</sup> ..... \$1,000 per accident
- Hospital ICU Admission<sup>1</sup> ..... \$1,500 per accident

<sup>1</sup> We will not pay the hospital admission benefit and the hospital intensive care unit (ICU) admission benefit for the same covered accident simultaneously.

- Hospital Confinement<sup>2</sup> ..... \$200 per day up to 365 days per accident
- Hospital ICU Confinement<sup>2</sup> ..... \$400 per day up to 15 days per accident

<sup>2</sup> We will not pay the hospital confinement benefit and the hospital ICU confinement benefit simultaneously.

**Accident Follow-Up Care**

- Accident Follow-Up Doctor Visit ..... \$50 (up to 3 visits per accident)
- Appliances ..... \$100 (such as wheelchair, crutches)
- Medical Imaging Study ..... \$150 per accident (limit 1 per covered accident and 1 per calendar year)
- Occupational or Physical Therapy ..... \$25 per day up to 10 days
- Pain Management (Epidural Anesthesia) ..... \$100 (limit 1 per covered accident)
- Prosthetic Devices/Artificial Limb ..... \$500 – one, \$1,000 – two or more
- Rehabilitation Unit Confinement<sup>3</sup> ..... \$100 per day up to 15 days per covered accident, and 30 days per calendar year

<sup>3</sup> We will not pay the hospital confinement benefit and the rehabilitation unit confinement benefit simultaneously.

**Accidental Dismemberment**

- Loss of Finger/Toe ..... \$750 – one, \$1,500 – two or more
- Loss or Loss of Use of Hand/Foot/Sight of Eye ..... \$7,500 – one, \$15,000 – two or more

**Catastrophic Accident**

For severe injuries that result in the total and irrecoverable:

- Loss of one hand and one foot
- Loss of both hands or both feet
- Loss or loss of use of one arm and one leg
- Loss or loss of use of both arms or both legs
- Loss of the sight of both eyes
- Loss of the hearing of both ears
- Loss of the ability to speak

Named Insured ..... \$50,000      Spouse ..... \$50,000      Child(ren) ..... \$25,000

Six month elimination period. Payable once per lifetime for each covered person.

**Accidental Death**

	Accidental Death	Common Carrier
● Named Insured	\$25,000	\$100,000
● Spouse	\$25,000	\$100,000
● Child(ren)	\$5,000	\$20,000

### Will I have to answer health questions to receive coverage?

Coverage is Guaranteed Issue. No health questions will be asked.

### How do I know how much a benefit pays?

Benefit amounts are preset and not based on the medical expenses you are charged. You get a lump sum payment that is specific to the injury or treatment required.

### What additional features are included?

- Worldwide coverage
- Portable
- Compliant with Health Savings Account (HSA) guidelines

### Will my accident claim payment be reduced if I have other insurance?

You're paid regardless of any insurance you may have with other insurance companies, and the benefits are paid directly to you (unless you specify otherwise).

### How do I file a claim?

Visit [coloniallife.com](http://coloniallife.com) or call our Customer Service Department at 1-800-325-4368 for additional information.

## My Coverage Worksheet (For use with your Colonial Life benefits counselor)

### Who will be covered? (check one)

- |   |   |
|---|---|
| <input type="radio"/> Employee Only     | <input type="radio"/> Employee & Spouse |
| <input type="radio"/> One-Parent Family | <input type="radio"/> Two-Parent Family |

### When are covered accident benefits available? (check one)

- |   |   |
|---|---|
| <input type="radio"/> On and Off-Job Benefits | <input type="radio"/> Off-Job Only Benefits |
|---|---|

### EXCLUSIONS AND LIMITATIONS

We will not pay any benefits for losses that are caused by, contributed to by or occur as a result of: felonies or illegal occupations; hazardous avocations; racing; semi-professional or professional sports; sickness; suicide or injuries which any covered person intentionally does to himself; war or armed conflict. In addition to the exclusions listed above, we also will not pay the Catastrophic Accident benefit for injuries that are caused by or are the consequence of: birth or intoxicants and narcotics. The covered person must incur a charge and the certificate must be in force for benefits to be payable.

For cost and complete details, see your Colonial Life benefits counselor. Applicable to policy number GACC1.0-P-CA and certificate number GACC1.0-C-CA. This is not an insurance contract and only the actual policy provisions will control.

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# Colonial Life

## Group Cancer

# COLONIAL LIFE & ACCIDENT INSURANCE COMPANY

1200 Colonial Life Boulevard, P. O. Box 1365  
 Columbia, South Carolina 29202  
 (800) 325-4368

## GROUP SPECIFIED DISEASE INSURANCE

### Outline of Coverage

(Applicable to certificate form GCAN-C-CA)

**THIS IS LIMITED BENEFIT GROUP SPECIFIED DISEASE COVERAGE. THE POLICY PROVIDES LIMITED BENEFITS FOR CANCER AND CANCER SCREENING PROCEDURES. BENEFITS PROVIDED ARE SUPPLEMENTAL AND NOT INTENDED TO COVER ALL MEDICAL EXPENSES. THIS IS NOT A SUBSTITUTE FOR COMPREHENSIVE HEALTH INSURANCE.**

**THIS IS NOT MEDICARE SUPPLEMENT COVERAGE.**

**If you are eligible for Medicare, review the Guide To Health Insurance for People with Medicare available from the company.**

**Read your certificate carefully.** This outline provides a very brief description of the important features of the Group Specified Disease Insurance certificate. This is not an insurance contract and only the actual policy provisions will control. The policy sets forth in detail the rights and obligations of the policyholder, you and us. The certificate is a summary of the policy and is a written statement, including the certificate schedule, prepared by us to set forth a summary of benefits to which the covered person is entitled, to whom the benefits are payable, and limitations or requirements that may apply and amendments, riders and supplements, if any. It is, therefore, important that you **READ YOUR CERTIFICATE CAREFULLY.**

The certificate provides benefits if the first date of diagnosis of cancer or the performance of a cancer screening test occurs: while the certificate is in force; and if the cancer or treatment is not excluded by name or specific description in the policy or certificate. Cancer must be pathologically or clinically diagnosed. If cancer is not diagnosed until after the covered person dies, we will only pay benefits for the treatment of cancer performed during the 45 day period before the covered person's death.

**Benefits**

**\$50 Cancer Screening/Wellness Benefit**

We will pay this benefit if any covered person has one of the following cancer screening tests performed while his coverage is in force. This benefit is payable once per calendar year for each covered person.

*Cancer screening test* is defined as:

<ul style="list-style-type: none"> <li>• Biopsy of skin lesion;</li> <li>• Bone marrow aspiration/biopsy;</li> <li>• Breast ultrasound;</li> <li>• CA 15-3 (blood test for breast cancer);</li> <li>• CA125 (blood test for ovarian cancer);</li> <li>• CEA (blood test for colon cancer);</li> <li>• Chest X-ray;</li> <li>• Colonoscopy;</li> </ul>	<ul style="list-style-type: none"> <li>• Flexible sigmoidoscopy;</li> <li>• Hemoccult stool analysis;</li> <li>• PSA (blood test for prostate cancer);</li> <li>• Serum Protein Electrophoresis (blood test for myeloma);</li> <li>• Thermography;</li> <li>• Virtual Colonoscopy.</li> </ul>
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**Mammogram Benefit \$150 per test**

We will pay this benefit if a covered person receives a mammogram. The test must be performed:

- while the coverage is in force.

We will pay for one baseline mammogram if the covered person is between the ages of 35 and 39, one mammogram every two calendar years if the covered person is 40 to 49 years of age, or more frequently if recommended by the covered person's physician, and one mammogram each calendar year if the covered person is 50 years of age or older.

**Pap Smear Benefit \$70 per test**

We will pay this benefit if a covered person receives a pap smear or ThinPrep Pap Test. The test must be performed:

- while the coverage is in force.

**Hospital Confinement/Hospital Intensive Care Unit Confinement** **\$100 per day for first 30 days of hospital confinement in a calendar year**  
**\$200 per day for hospital confinement after the first 30 days of hospital confinement in a calendar year**  
**\$200 per day for hospital intensive care unit confinement**  
**Maximum benefit of 180 days per calendar year for hospital confinement and hospital intensive care unit confinement combined.**

We will pay the applicable benefit shown above for each day any covered person incurs charges for hospital confinement or hospital intensive care unit confinement for the treatment of cancer up to the 180-day maximum per calendar year.

**Hospital Confinement/Hospital Intensive Care Unit Confinement in a U.S. Government Hospital** **\$100 per day for first 30 days of hospital confinement in a calendar year**  
**\$200 per day for hospital confinement after the first 30 days of hospital confinement in a calendar year**  
**\$200 per day for hospital intensive care unit confinement**  
**Maximum benefit of 180 days per calendar year for hospital confinement and hospital intensive care unit confinement combined.**

We will pay the applicable benefit shown above for each day any covered person is confined in a U. S. Government hospital or a U. S. Government hospital intensive care unit for the treatment of cancer up to the 180-day maximum per calendar year.

**Ambulance** **\$100 per trip**

We will pay this benefit for each trip any covered person makes if a professional ambulance service transports him to or from a hospital where he is confined as an inpatient for the treatment of cancer. He must incur charges for a professional ambulance service to receive this benefit. We will pay for no more than two one-way trips each time he is confined as an inpatient for the treatment of cancer. We will pay this benefit directly to the provider unless the ambulance bill shows that all charges have been paid in full.

**Private Full-Time Nursing** **\$100 per day**

We will pay this benefit for each day any covered person incurs charges for and uses private full-time nursing services required and authorized by his doctor while he is confined to a hospital for the treatment of cancer. Private full-time nursing must be performed by a registered, a licensed practical or a licensed vocational nurse.

**Attending Physician** **\$50 per day up to a maximum of 180 days per calendar year**

We will pay this benefit if any covered person incurs charges for and uses the services of an attending physician while confined to a hospital for the treatment of cancer. An *attending physician* is a doctor, other than the covered person's surgeon, who performs services for him while confined to a hospital.

**Radiation/Chemotherapy** **\$150 a day up to a maximum of \$5,000 per calendar year**

We will pay this benefit for each day any covered person incurs charges for and receives one or more of the following treatments for the purpose of the destruction of malignant cells during the treatment of internal (not skin) cancer up to the calendar year maximum: teloradiotherapy, using either natural or artificially propagated radiation; interstitial or intracavitary application of radium or radioisotopes in sealed or non-sealed sources; or chemical substances that have a cancericidal effect (chemotherapy). Radiation and chemotherapy treatments must be approved for the treatment of cancer by the United States Food and Drug Administration. We will not pay for office visits, laboratory tests, diagnostic X-rays, treatment planning, simulation, treatment devices, dosimetry, radiation physics, teletherapy or other procedures related to these treatments. **This benefit is not payable for skin cancer.**

**Antinausea Medication** **\$50 a day up to a maximum of \$200 per calendar year**

We will pay this benefit for each day any covered person incurs charges for and receives antinausea medication administered in a doctor's office, clinic or hospital or has a prescription filled for antinausea medication as a result of radiation or chemotherapy treatments, up to the calendar year maximum. We will pay only one Antinausea Medication benefit per day regardless of the number of antinausea medications the covered person receives on the same day.

**Blood, Plasma, Platelets and Immunoglobulins** **\$150 per day, up to a maximum of \$5,000 per calendar year**

We will pay this benefit for each day any covered person incurs charges for and receives a transfusion of blood/plasma/platelets/immunoglobulins during the treatment of cancer, up to the calendar year maximum.

**Experimental Treatment** **\$300 per day up to \$10,000 lifetime maximum**

We will pay this benefit for each day that any covered person incurs charges for and receives hospital, medical or surgical care in connection with experimental treatment of internal (not skin) cancer. These treatments must be prescribed by a physician and must be received in an experimental cancer treatment program. Treatment must be received in the United States. **This benefit is not payable for skin cancer.** Payment of this benefit is in place of payment of any other benefit for the same covered treatments.

**Hair/External Breast/Voice \$200 per calendar year****Box Prosthesis**

We will pay this benefit if any covered person incurs charges for and receives a hair prosthesis, external breast prosthesis or voice box prosthesis needed as a direct result of cancer.

**Supportive or Protective Care Drugs and Colony Stimulating Factors \$100 per day up to \$800 calendar year maximum****Supportive or Protective Care Drugs and Colony****Stimulating Factors**

We will pay this benefit for each day that any covered person incurs charges for and receives supportive or protective care drugs and/or colony stimulating factors for the treatment of cancer, up to the calendar year maximum.

**Bone Marrow Stem Cell Transplant \$10,000 per lifetime**

We will pay this benefit if any covered person incurs charges for and receives a bone marrow stem cell transplant for the treatment of cancer. We will pay this benefit only once per lifetime for each covered person.

**Peripheral Stem Cell Transplant \$5,000 per lifetime**

We will pay this benefit if any covered person incurs charges for and receives a peripheral stem cell transplant for the treatment of cancer. We will pay this benefit only once per lifetime for each covered person.

**Transportation \$0.40 per mile up to 700 miles per round trip**

We will pay this benefit if: any covered person travels on his doctor's advice to another city for diagnosis or treatment of his cancer; the destination is more than 50 miles one way from the city where he lives; and he is receiving treatment for internal (not skin) cancer. We will pay this benefit when charges are incurred for travel to and from his destination for either: commercial travel (plane, train or bus); or non-commercial travel (use of a personal car). **This benefit is not payable for skin cancer.**

**Transportation for Companion \$0.40 per mile up to 700 miles per round trip**

We will pay this benefit for one companion to accompany any covered person to another city where he is receiving treatment for cancer if: his doctor advises treatment or diagnosis of his cancer in another city; the destination is more than 50 miles one way from the city where he lives; and he is receiving treatment for internal (not skin) cancer.

We will pay this benefit when charges are incurred for travel to and from any covered person's destination for either: commercial travel (plane, train or bus); or non-commercial travel (use of personal car). **This benefit is not payable for skin cancer.**

**Lodging \$50 per day up to 70 days maximum per calendar year**

We will pay this benefit for each day any covered person or any adult companion incurs charges for lodging required while the covered person is being treated for cancer more than 50 miles from his residence. We will pay for up to 70 days per calendar year.

**Surgery \$30 per surgical unit up to \$1,500 per procedure**

We will pay this benefit if any covered person incurs charges for and has a surgical procedure performed by a doctor for treatment of cancer up to the maximum benefit amount.

**Anesthesia 25% of the amount of the Surgery benefit paid**

We will pay this benefit if any covered person incurs charges for and receives general anesthesia administered by an anesthesiologist or a Certified Registered Nurse Anesthetist during a surgical procedure that is performed for the treatment of cancer.

**\$25 per procedure** – We will pay this benefit if any covered person incurs charges for and receives local anesthesia during a surgical procedure performed for the treatment of cancer and for which a benefit is payable under this certificate.

**Second Medical Opinion \$300 per malignant condition**

We will pay this benefit if any covered person incurs charges for and obtains a second medical opinion from another doctor on recommended surgery or treatment following the positive diagnosis of internal (not skin) cancer. We will pay this benefit only once for each cancerous condition. **This benefit is not payable for skin cancer treatment or reconstructive surgery.**

**Reconstructive Surgery \$30 per surgical unit up to a maximum of \$1,500 per procedure, including general anesthesia**

We will pay this benefit if a covered person incurs charges for a reconstructive surgery that: requires an incision; is performed by a doctor for treatment of cancer; and is due to internal (not skin) cancer. We will pay for no more than two surgeries per site. **This benefit is not payable for skin cancer.**

If the Reconstructive Surgery benefit is less than the maximum benefit amount allowed for this benefit, then we will also pay up to 25% of the Reconstructive Surgery benefit amount if a covered person incurs charges for and has general anesthesia administered during surgery. For the purposes of this provision, reconstructive surgery includes, but is not limited to, surgical procedures performed following a mastectomy on one breast or both breasts to reestablish symmetry between the two breasts, augmentation mammoplasty, reduction mammoplasty and mastopexy.

**Prosthesis/Artificial Limb \$2,000 per device or artificial limb up to a \$4,000 lifetime maximum**

We will pay this benefit if any covered person incurs charges for a surgically implanted prosthetic device or artificial limb needed as a direct result of cancer surgery, up to the lifetime maximum. We will pay for no more than one of the same type of device per site.

**Outpatient Surgical Center** **\$250 a day up to a maximum of \$750 per calendar year**

We will pay this benefit for each day any covered person incurs charges for and has surgery at an outpatient surgical center for internal (not skin) cancer, up to the calendar year maximum. **This benefit is not payable for skin cancer.**

**Skilled Nursing Care Facility** **\$300 per day**

We will pay this benefit for each day any covered person incurs charges for and is confined to a skilled nursing care facility during the treatment of cancer. Confinement must begin within 14 days after the covered person is released from a hospital. We will pay this benefit for no more than the number of days for which we paid the Hospital Confinement/Hospital Intensive Care Unit Confinement benefit or the Hospital Confinement/ Hospital Intensive Care Unit Confinement in a U. S. Government Hospital benefit for his most recent confinement.

**Hospice** **\$300 per day**

We will pay this benefit for each day any covered person incurs charges for and: receives a visit from a representative of a hospice at home; uses the services of a hospital or a U.S. Government Hospital on an outpatient basis under the direction of a hospice; visits a hospice on an outpatient basis for treatment or services as the result of cancer; or is confined to a hospice facility.

**Home Health Care Services** **\$300 per day**

We will pay this benefit for up to the greater of: 30 days per calendar year; or twice the number of days any covered person incurs charges for and was confined to a hospital during a calendar year for the treatment of cancer.

**Waiver of Premium**

You, the named insured, will not be required to continue to pay premiums to keep your coverage in force if: the first date of diagnosis is while your coverage is in force; and you become disabled, as defined in the certificate, because of cancer after the effective date of your coverage and remain disabled for longer than three continuous months (90 days).

**Termination**

The policy can be cancelled by the policyholder or us. Your coverage will terminate if the policy terminates, if your premium is not paid, if you are no longer eligible for the coverage or if you ask us to end your coverage. If this is family coverage, coverage on your spouse and dependent children will terminate if the policy terminates, if premium for family coverage is not paid, if your coverage terminates, if you ask us to end their coverage or if you die. In addition, coverage on your spouse will terminate if you divorce your spouse or your marriage is annulled, and coverage on any dependent child will terminate when he no longer qualifies as a dependent child.

**Conversion Privilege**

If one of the following events occurs:

- your coverage terminates because you are no longer in an eligible class or your class is no longer eligible for coverage, or
- coverage of your spouse under the certificate terminates due to divorce, annulment or your death, or
- coverage of a covered dependent child terminates due to the child becoming married or reaching age 26, or
- coverage of a covered person who has received benefits for the treatment of cancer under the certificate terminates for any reason,

then such covered person may be eligible to obtain an individual policy of insurance (called the converted policy), without evidence of insurability. Obtaining that policy is subject to certain conditions, including but not limited to:

- Such covered person's coverage under the certificate must have been in effect for 12 months unless such covered person has received benefits for the treatment of cancer under the certificate.
- You must be age 64 or younger. Provided, however, that if you have received benefits for the treatment of cancer under the certificate, you may obtain a converted policy even if over age 64.
- Application for the converted policy must be made to us within 31 days after the coverage terminates.
- The converted policy may have different benefits, limitations and exclusions and premium rates.
- If you are eligible for a converted policy, any spouse or dependent children covered under the certificate may also be covered under the converted policy. If a spouse is eligible for a converted policy due to divorce or annulment, any dependent children covered under the certificate may also be covered under the converted policy or they may remain covered under the certificate as you and your former spouse may elect. They may not be covered under both the certificate and the converted policy. If a spouse is eligible for a converted policy due to your death, any dependent children covered under the certificate may also be covered under the converted policy.

**Definitions****Cancer**

*Cancer* means a disease which is identified by the presence of malignant cells or a malignant tumor characterized by the uncontrolled and abnormal growth and spread of invasive malignant cells. Pre-malignant conditions, conditions with malignant potential or benign tumors or polyps that do not meet this definition of cancer will not be covered under the certificate. Cancer must be diagnosed by a pathological diagnosis or a clinical diagnosis.

**Dependent children**

*Dependent children* means any natural children, step-children, legally adopted children or children placed into your custody for adoption who are: unmarried; chiefly dependent on you or your spouse for support; and younger than age 26.

**Internal Cancer**

Cancer of an organ other than skin, but including melanoma of Clark's Classification Level III and higher or Breslow .75 or greater.

**Pre-existing Condition**

*Pre-existing Condition* means a sickness or physical condition for which any covered person was treated, had medical testing, received medical advice or had taken medication within 12 months before the effective date of the coverage and which is not excluded by name or specific description in the certificate.

**Skin Cancer**

*Skin cancer* means: melanoma of Clark's Classification Level I or II (Breslow Classification less than .75mm); basal cell carcinoma; or squamous cell carcinoma of the skin. *Clark's Classification* is determined by assessing how many derman (skin) layers the tumor has invaded. The *Breslow Classification* is determined by tumor thickness as measured by a pathologist.

**Pre-Existing Condition Limitation:** We will not cover cancer that meets the requirements of the Eligibility for Cancer Benefits provision in the certificate but is a preexisting condition as defined in the certificate, unless the covered person has satisfied the pre-existing condition limitation period shown on the Certificate Schedule. No benefits will be payable for any cancer for which the requirements of the Eligibility for Cancer Benefits provision are not met.



# COLONIAL LIFE & ACCIDENT INSURANCE COMPANY

1200 Colonial Life Boulevard, P. O. Box 1365  
Columbia, South Carolina 29202  
(800) 325-4368

## GROUP SPECIFIED DISEASE INSURANCE

### Outline of Coverage

(Applicable to certificate form GCAN-C-CA)

**THIS IS LIMITED BENEFIT GROUP SPECIFIED DISEASE COVERAGE. THE POLICY PROVIDES LIMITED BENEFITS FOR CANCER AND CANCER SCREENING PROCEDURES. BENEFITS PROVIDED ARE SUPPLEMENTAL AND NOT INTENDED TO COVER ALL MEDICAL EXPENSES. THIS IS NOT A SUBSTITUTE FOR COMPREHENSIVE HEALTH INSURANCE.**

**THIS IS NOT MEDICARE SUPPLEMENT COVERAGE.**

**If you are eligible for Medicare, review the Guide To Health Insurance for People with Medicare available from the company.**

**Read your certificate carefully.** This outline provides a very brief description of the important features of the Group Specified Disease Insurance certificate. This is not an insurance contract and only the actual policy provisions will control. The policy sets forth in detail the rights and obligations of the policyholder, you and us. The certificate is a summary of the policy and is a written statement, including the certificate schedule, prepared by us to set forth a summary of benefits to which the covered person is entitled, to whom the benefits are payable, and limitations or requirements that may apply and amendments, riders and supplements, if any. It is, therefore, important that you **READ YOUR CERTIFICATE CAREFULLY.**

The certificate provides benefits if the first date of diagnosis of cancer or the performance of a cancer screening test occurs: while the certificate is in force; and if the cancer or treatment is not excluded by name or specific description in the policy or certificate. Cancer must be pathologically or clinically diagnosed. If cancer is not diagnosed until after the covered person dies, we will only pay benefits for the treatment of cancer performed during the 45 day period before the covered person's death.

#### **Benefits**

#### **\$75 Cancer Screening/Wellness Benefit**

We will pay this benefit if any covered person has one of the following cancer screening tests performed while his coverage is in force. This benefit is payable once per calendar year for each covered person.

*Cancer screening test* is defined as:

<ul style="list-style-type: none"> <li>• Biopsy of skin lesion;</li> <li>• Bone marrow aspiration/biopsy;</li> <li>• Breast ultrasound;</li> <li>• CA 15-3 (blood test for breast cancer);</li> <li>• CA125 (blood test for ovarian cancer);</li> <li>• CEA (blood test for colon cancer);</li> <li>• Chest X-ray;</li> <li>• Colonoscopy;</li> </ul>	<ul style="list-style-type: none"> <li>• Flexible sigmoidoscopy;</li> <li>• Hemoccult stool analysis;</li> <li>• PSA (blood test for prostate cancer);</li> <li>• Serum Protein Electrophoresis (blood test for myeloma);</li> <li>• Thermography;</li> <li>• Virtual Colonoscopy.</li> </ul>
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#### **Mammogram Benefit \$150 per test**

We will pay this benefit if a covered person receives a mammogram. The test must be performed:

- while the coverage is in force.

We will pay for one baseline mammogram if the covered person is between the ages of 35 and 39, one mammogram every two calendar years if the covered person is 40 to 49 years of age, or more frequently if recommended by the covered person's physician, and one mammogram each calendar year if the covered person is 50 years of age or older.

#### **Pap Smear Benefit \$70 per test**

We will pay this benefit if a covered person receives a pap smear or ThinPrep Pap Test. The test must be performed:

- while the coverage is in force.



**Hospital Confinement/Hospital Intensive Care Unit Confinement** **\$200 per day for first 30 days of hospital confinement in a calendar year**  
**\$400 per day for hospital confinement after the first 30 days of hospital confinement in a calendar year**  
**\$400 per day for hospital intensive care unit confinement**  
**Maximum benefit of 180 days per calendar year for hospital confinement and hospital intensive care unit confinement combined.**

We will pay the applicable benefit shown above for each day any covered person incurs charges for hospital confinement or hospital intensive care unit confinement for the treatment of cancer up to the 180-day maximum per calendar year.

**Hospital Confinement/Hospital Intensive Care Unit Confinement in a U.S. Government Hospital** **\$200 per day for first 30 days of hospital confinement in a calendar year**  
**\$400 per day for hospital confinement after the first 30 days of hospital confinement in a calendar year**  
**\$400 per day for hospital intensive care unit confinement**  
**Maximum benefit of 180 days per calendar year for hospital confinement and hospital intensive care unit confinement combined.**

We will pay the applicable benefit shown above for each day any covered person is confined in a U. S. Government hospital or a U. S. Government hospital intensive care unit for the treatment of cancer up to the 180-day maximum per calendar year.

**Ambulance** **\$100 per trip**

We will pay this benefit for each trip any covered person makes if a professional ambulance service transports him to or from a hospital where he is confined as an inpatient for the treatment of cancer. He must incur charges for a professional ambulance service to receive this benefit. We will pay for no more than two one-way trips each time he is confined as an inpatient for the treatment of cancer. We will pay this benefit directly to the provider unless the ambulance bill shows that all charges have been paid in full.

**Private Full-Time Nursing** **\$200 per day**

We will pay this benefit for each day any covered person incurs charges for and uses private full-time nursing services required and authorized by his doctor while he is confined to a hospital for the treatment of cancer. Private full-time nursing must be performed by a registered, a licensed practical or a licensed vocational nurse.

**Attending Physician** **\$50 per day up to a maximum of 180 days per calendar year**

We will pay this benefit if any covered person incurs charges for and uses the services of an attending physician while confined to a hospital for the treatment of cancer. An *attending physician* is a doctor, other than the covered person's surgeon, who performs services for him while confined to a hospital.

**Radiation/Chemotherapy** **\$225 a day up to a maximum of \$7,500 per calendar year**

We will pay this benefit for each day any covered person incurs charges for and receives one or more of the following treatments for the purpose of the destruction of malignant cells during the treatment of internal (not skin) cancer up to the calendar year maximum: teloradiotherapy, using either natural or artificially propagated radiation; interstitial or intracavitary application of radium or radioisotopes in sealed or non-sealed sources; or chemical substances that have a cancericidal effect (chemotherapy). Radiation and chemotherapy treatments must be approved for the treatment of cancer by the United States Food and Drug Administration. We will not pay for office visits, laboratory tests, diagnostic X-rays, treatment planning, simulation, treatment devices, dosimetry, radiation physics, teletherapy or other procedures related to these treatments. **This benefit is not payable for skin cancer.**

**Antinausea Medication** **\$50 a day up to a maximum of \$200 per calendar year**

We will pay this benefit for each day any covered person incurs charges for and receives antinausea medication administered in a doctor's office, clinic or hospital or has a prescription filled for antinausea medication as a result of radiation or chemotherapy treatments, up to the calendar year maximum. We will pay only one Antinausea Medication benefit per day regardless of the number of antinausea medications the covered person receives on the same day.

**Blood, Plasma, Platelets and Immunoglobulins** **\$225 per day, up to a maximum of \$7,500 per calendar year**

We will pay this benefit for each day any covered person incurs charges for and receives a transfusion of blood/plasma/platelets/immunoglobulins during the treatment of cancer, up to the calendar year maximum.

**Experimental Treatment** **\$300 per day up to \$10,000 lifetime maximum**

We will pay this benefit for each day that any covered person incurs charges for and receives hospital, medical or surgical care in connection with experimental treatment of internal (not skin) cancer. These treatments must be prescribed by a physician and must be received in an experimental cancer treatment program. Treatment must be received in the United States. **This benefit is not payable for skin cancer.** Payment of this benefit is in place of payment of any other benefit for the same covered treatments.

**Hair/External Breast/Voice Box Prosthesis** **\$200 per calendar year**

We will pay this benefit if any covered person incurs charges for and receives a hair prosthesis, external breast prosthesis or voice box prosthesis needed as a direct result of cancer.

**Supportive or Protective Care Drugs and Colony Stimulating Factors** **\$150 per day up to \$1,200 calendar year maximum**

We will pay this benefit for each day that any covered person incurs charges for and receives supportive or protective care drugs and/or colony stimulating factors for the treatment of cancer, up to the calendar year maximum.

**Bone Marrow Stem Cell Transplant** **\$10,000 per lifetime**

We will pay this benefit if any covered person incurs charges for and receives a bone marrow stem cell transplant for the treatment of cancer. We will pay this benefit only once per lifetime for each covered person.

**Peripheral Stem Cell Transplant** **\$5,000 per lifetime**

We will pay this benefit if any covered person incurs charges for and receives a peripheral stem cell transplant for the treatment of cancer. We will pay this benefit only once per lifetime for each covered person.

**Transportation** **\$0.40 per mile up to 700 miles per round trip**

We will pay this benefit if: any covered person travels on his doctor's advice to another city for diagnosis or treatment of his cancer; the destination is more than 50 miles one way from the city where he lives; and he is receiving treatment for internal (not skin) cancer. We will pay this benefit when charges are incurred for travel to and from his destination for either: commercial travel (plane, train or bus); or non-commercial travel (use of a personal car). **This benefit is not payable for skin cancer.**

**Transportation for Companion** **\$0.40 per mile up to 700 miles per round trip**

We will pay this benefit for one companion to accompany any covered person to another city where he is receiving treatment for cancer if: his doctor advises treatment or diagnosis of his cancer in another city; the destination is more than 50 miles one way from the city where he lives; and he is receiving treatment for internal (not skin) cancer.

We will pay this benefit when charges are incurred for travel to and from any covered person's destination for either: commercial travel (plane, train or bus); or non-commercial travel (use of personal car). **This benefit is not payable for skin cancer.**

**Lodging** **\$50 per day up to 70 days maximum per calendar year**

We will pay this benefit for each day any covered person or any adult companion incurs charges for lodging required while the covered person is being treated for cancer more than 50 miles from his residence. We will pay for up to 70 days per calendar year.

**Surgery** **\$60 per surgical unit up to \$3,000 per procedure**

We will pay this benefit if any covered person incurs charges for and has a surgical procedure performed by a doctor for treatment of cancer up to the maximum benefit amount.

**Anesthesia** **25% of the amount of the Surgery benefit paid**

We will pay this benefit if any covered person incurs charges for and receives general anesthesia administered by an anesthesiologist or a Certified Registered Nurse Anesthetist during a surgical procedure that is performed for the treatment of cancer.

**\$50 per procedure** – We will pay this benefit if any covered person incurs charges for and receives local anesthesia during a surgical procedure performed for the treatment of cancer and for which a benefit is payable under this certificate.

**Second Medical Opinion** **\$300 per malignant condition**

We will pay this benefit if any covered person incurs charges for and obtains a second medical opinion from another doctor on recommended surgery or treatment following the positive diagnosis of internal (not skin) cancer. We will pay this benefit only once for each cancerous condition. **This benefit is not payable for skin cancer treatment or reconstructive surgery.**

**Reconstructive Surgery** **\$60 per surgical unit up to a maximum of \$3,000 per procedure, including general anesthesia**

We will pay this benefit if a covered person incurs charges for a reconstructive surgery that: requires an incision; is performed by a doctor for treatment of cancer; and is due to internal (not skin) cancer. We will pay for no more than two surgeries per site. **This benefit is not payable for skin cancer.**

If the Reconstructive Surgery benefit is less than the maximum benefit amount allowed for this benefit, then we will also pay up to 25% of the Reconstructive Surgery benefit amount if a covered person incurs charges for and has general anesthesia administered during surgery. For the purposes of this provision, reconstructive surgery includes, but is not limited to, surgical procedures performed following a mastectomy on one breast or both breasts to reestablish symmetry between the two breasts, augmentation mammoplasty, reduction mammoplasty and mastopexy.

**Prosthesis/Artificial Limb** **\$2,000 per device or artificial limb up to a \$4,000 lifetime maximum**

We will pay this benefit if any covered person incurs charges for a surgically implanted prosthetic device or artificial limb needed as a direct result of cancer surgery, up to the lifetime maximum. We will pay for no more than one of the same type of device per site.

**Outpatient Surgical Center****\$500 a day up to a maximum of \$1,500 per calendar year**

We will pay this benefit for each day any covered person incurs charges for and has surgery at an outpatient surgical center for internal (not skin) cancer, up to the calendar year maximum. **This benefit is not payable for skin cancer.**

**Skilled Nursing Care Facility****\$300 per day**

We will pay this benefit for each day any covered person incurs charges for and is confined to a skilled nursing care facility during the treatment of cancer. Confinement must begin within 14 days after the covered person is released from a hospital. We will pay this benefit for no more than the number of days for which we paid the Hospital Confinement/Hospital Intensive Care Unit Confinement benefit or the Hospital Confinement/ Hospital Intensive Care Unit Confinement in a U. S. Government Hospital benefit for his most recent confinement.

**Hospice****\$300 per day**

We will pay this benefit for each day any covered person incurs charges for and: receives a visit from a representative of a hospice at home; uses the services of a hospital or a U.S. Government Hospital on an outpatient basis under the direction of a hospice; visits a hospice on an outpatient basis for treatment or services as the result of cancer; or is confined to a hospice facility.

**Home Health Care Services****\$300 per day**

We will pay this benefit for up to the greater of: 30 days per calendar year; or twice the number of days any covered person incurs charges for and was confined to a hospital during a calendar year for the treatment of cancer.

**Waiver of Premium**

You, the named insured, will not be required to continue to pay premiums to keep your coverage in force if: the first date of diagnosis is while your coverage is in force; and you become disabled, as defined in the certificate, because of cancer after the effective date of your coverage and remain disabled for longer than three continuous months (90 days).

**Termination**

The policy can be cancelled by the policyholder or us. Your coverage will terminate if the policy terminates, if your premium is not paid, if you are no longer eligible for the coverage or if you ask us to end your coverage. If this is family coverage, coverage on your spouse and dependent children will terminate if the policy terminates, if premium for family coverage is not paid, if your coverage terminates, if you ask us to end their coverage or if you die. In addition, coverage on your spouse will terminate if you divorce your spouse or your marriage is annulled, and coverage on any dependent child will terminate when he no longer qualifies as a dependent child.

**Conversion Privilege**

If one of the following events occurs:

- your coverage terminates because you are no longer in an eligible class or your class is no longer eligible for coverage, or
- coverage of your spouse under the certificate terminates due to divorce, annulment or your death, or
- coverage of a covered dependent child terminates due to the child becoming married or reaching age 26, or
- coverage of a covered person who has received benefits for the treatment of cancer under the certificate terminates for any reason,

then such covered person may be eligible to obtain an individual policy of insurance (called the converted policy), without evidence of insurability. Obtaining that policy is subject to certain conditions, including but not limited to:

- Such covered person's coverage under the certificate must have been in effect for 12 months unless such covered person has received benefits for the treatment of cancer under the certificate.
- You must be age 64 or younger. Provided, however, that if you have received benefits for the treatment of cancer under the certificate, you may obtain a converted policy even if over age 64.
- Application for the converted policy must be made to us within 31 days after the coverage terminates.
- The converted policy may have different benefits, limitations and exclusions and premium rates.
- If you are eligible for a converted policy, any spouse or dependent children covered under the certificate may also be covered under the converted policy. If a spouse is eligible for a converted policy due to divorce or annulment, any dependent children covered under the certificate may also be covered under the converted policy or they may remain covered under the certificate as you and your former spouse may elect. They may not be covered under both the certificate and the converted policy. If a spouse is eligible for a converted policy due to your death, any dependent children covered under the certificate may also be covered under the converted policy.

**Definitions****Cancer**

*Cancer* means a disease which is identified by the presence of malignant cells or a malignant tumor characterized by the uncontrolled and abnormal growth and spread of invasive malignant cells. Pre-malignant conditions, conditions with malignant potential or benign tumors or polyps that do not meet this definition of cancer will not be covered under the certificate. Cancer must be diagnosed by a pathological diagnosis or a clinical diagnosis.

**Dependent children**

*Dependent children* means any natural children, step-children, legally adopted children or children placed into your custody for adoption who are: unmarried; chiefly dependent on you or your spouse for support; and younger than age 26.

**Internal Cancer**

Cancer of an organ other than skin, but including melanoma of Clark's Classification Level III and higher or Breslow .75 or greater.

**Pre-existing Condition**

*Pre-existing Condition* means a sickness or physical condition for which any covered person was treated, had medical testing, received medical advice or had taken medication within 12 months before the effective date of the coverage and which is not excluded by name or specific description in the certificate.

**Skin Cancer**

*Skin cancer* means: melanoma of Clark's Classification Level I or II (Breslow Classification less than .75mm); basal cell carcinoma; or squamous cell carcinoma of the skin. *Clark's Classification* is determined by assessing how many derman (skin) layers the tumor has invaded. The *Breslow Classification* is determined by tumor thickness as measured by a pathologist.

**Pre-Existing Condition Limitation:** We will not cover cancer that meets the requirements of the Eligibility for Cancer Benefits provision in the certificate but is a preexisting condition as defined in the certificate, unless the covered person has satisfied the pre-existing condition limitation period shown on the Certificate Schedule. No benefits will be payable for any cancer for which the requirements of the Eligibility for Cancer Benefits provision are not met.



# Colonial Life

## Group Critical Care

### \$20K

# Group Specified Disease Insurance



## How will you pay for what your health insurance won't?

It's true—a serious medical event such as cancer, heart attack or stroke could leave you in a period of financial difficulty. Even if you have major medical coverage, there are typically uncovered expenses to consider, such as deductibles and copayments, travel expenses to and from treatment centers and the loss of wages or salary. If faced with this situation, would you be able to maintain your current way of life?

### Group Critical Care Insurance may help guard you against financial hardship.

This specified disease coverage from Colonial Life & Accident Insurance Company offers the protection you need to concentrate on what is most important — your treatment, care and recovery.

You're free to use the benefits however you choose. And coverage may be available for you, your spouse/registered domestic partner and your eligible dependents.

#### Plan Features:

- A lump sum payment allows you the flexibility to better plan your treatment and care.
- You may adjust the face amount to best meet your personal needs.
- May pay multiple times for a covered critical illness.

### What benefits are included?

**Face Amount:** \$ 20,000

**Critical Illness Benefit:** This is a lump sum benefit to assist with the medical and/or non-medical costs associated with the diagnosis of a covered critical illness.

Covered Critical Illness Conditions	
For this critical illness...	We will pay this percentage of the face amount:
Heart Attack (Myocardial Infarction)	100%
Stroke	100%
End Stage Renal (Kidney) Failure	100%
Major Organ Failure <sup>1</sup>	100%
Coronary Artery Bypass Graft Surgery/Disease <sup>1</sup>	25%

<sup>1</sup> Benefit for Coronary Artery Disease applicable in lieu of benefit for Coronary Artery Bypass Graft Surgery when Health Savings Account (HSA) compliant plan is selected. Major Organ Failure is not included with the HSA-compliant plan.

## Can I use the critical illness coverage more than once?

**Yes! This plan includes coverage for subsequent diagnosis of a different critical illness.<sup>2</sup>**

If you receive a benefit for a critical illness, and later you are diagnosed with a different critical illness, we will pay the original percentage of the face amount for that particular critical illness.

**Yes! This plan includes coverage for subsequent diagnosis of the same critical illness.<sup>2</sup>**

If you receive a benefit for a critical illness and later you are diagnosed with the same critical illness (except those listed below), we will pay 25% of the original face amount. *Coronary Artery Bypass Graft Surgery/ Coronary Artery Disease<sup>1</sup> do not qualify.*

<sup>1</sup>Benefit for Coronary Artery Disease applicable in lieu of benefit for Coronary Artery Bypass Graft Surgery when Health Savings Account (HSA) compliant plan is selected. Major Organ Failure is not included with the HSA-compliant plan.

<sup>2</sup>Dates of Diagnoses of a covered critical illness must be separated by at least 180 days.

### **Mammography Benefit: \$200.**

We will pay this benefit if a covered person receives a mammogram. We will pay for one baseline mammogram if the covered person is between the ages of 35 and 39, one mammogram every two calendar years if ages 40 to 49 or more frequently if recommended by a physician, and one mammogram each calendar year if age 50 or older.

### **Cervical Cancer Screening Test: \$70.**

We will pay this benefit if a covered person receives a cervical cancer screening test approved by the FDA. This benefit is payable once per calendar year per covered person.

**EXCLUSIONS AND LIMITATIONS FOR CRITICAL ILLNESS** - We will not pay the Critical Illness Benefit or Benefit Payable Upon Subsequent Diagnosis of Critical Illness that occurs as a result of a covered person's: felonies or illegal occupations; intoxicants and controlled substances; psychiatric or psychological conditions; suicide or injuries which any covered person intentionally does to himself; war or armed conflict; or pre-existing condition, unless the covered person has satisfied the pre-existing condition limitation period shown on the Certificate Schedule on the date the covered person is diagnosed with a critical illness.

This is not an insurance contract and only the actual certificate provisions will control. Applicable to certificate form GCC1.0-CA. Please see your Colonial Life benefits counselor for details.

CA Lic. # \_\_\_\_\_

**Colonial Life**  
1200 Colonial Life Boulevard  
Columbia, South Carolina 29210  
coloniallife.com

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# Colonial Life

## Group Medical Bridge

# Group Specified Disease Insurance



## Health Screening Benefit

This benefit helps you pay for part of the expense of tests you may normally have each year. The benefit allows a maximum of 1 screening test per covered person per calendar year.

### Tests that qualify:

Stress test on a bicycle or treadmill	CA 125 (blood test for ovarian cancer)
Fasting blood glucose test	CEA (blood test for colon cancer)
Blood test for triglycerides	Chest x-ray
Serum cholesterol test to determine level of HDL and LDL	Colonoscopy
Bone marrow testing	Flexible sigmoidoscopy
Carotid Doppler	Hemoccult stool analysis
Electrocardiogram (EKG, ECG)	PSA (blood test for prostate cancer)
Echocardiogram (ECHO)	Serum protein electrophoresis (blood test for myeloma)
Skin cancer biopsy	Thermography
Breast ultrasound	Virtual colonoscopy
CA 15-3 (blood test for breast cancer)	

For cost and complete details, see your Colonial Life benefits counselor. Applicable to certificate form GCC-1.0-CA. This is not an insurance contract and only the actual certificate provisions will control. The certificate contains exclusions and limitations which may affect benefits payable.

CA Lic. # \_\_\_\_\_

Group Critical Care 1.0 — Health Screening Benefit – CA



# Group Hospital Confinement Indemnity Insurance Plan 1



Group Medical Bridge<sup>SM</sup> insurance can help with medical costs associated with a hospital stay that your health insurance may not cover. These benefits are available for you, your spouse and eligible dependent children.

**Hospital confinement benefit** ..... \$ 500 per day  
Maximum of one day per covered person per calendar year

### Health savings account (HSA) compatible

This plan is compatible with HSA guidelines. This plan may also be offered to employees who do not have HSAs.

Colonial Life & Accident Insurance Company's Group Medical Bridge offers an HSA compatible plan in most states.

For more information,  
talk with your  
benefits counselor.

ColonialLife.com

### EXCLUSIONS

We will not pay benefits for losses which are caused by: cosmetic surgery, dental procedures, felonies or illegal occupations, intoxicants or controlled substances, pregnancy of a dependent child, psychiatric or psychological conditions, suicide, intentional injuries, war, armed forces service or giving birth within the first nine months after the certificate effective date. We will not pay benefits for hospital confinement of a newborn child following his or her birth. However, we will pay for a newborn's hospital confinement (following birth) which is the result of a covered sickness or covered accident. We will not pay benefits for loss during the first 12 months after the effective date due to a pre-existing condition, which means a sickness or physical condition for which a covered person was diagnosed or treated within 12 months before the certificate effective date.

For cost and complete details, see your Colonial Life benefits counselor. Applicable to certificate number GMB1.0-C-CA-R. This is not an insurance contract and only the actual certificate provisions will control.

CA LIC#: \_\_\_\_\_

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# Group Hospital Confinement Indemnity Insurance Health Screening Benefit



Group Medical Bridge<sup>SM</sup> insurance's health screening benefit can help pay for health and wellness tests you have each year.

**Health screening benefit** ..... **\$50 per day**  
Maximum of one day per covered person per calendar year

- Any other generally medically accepted cancer screening test not listed
- Blood test for triglycerides
- Bone marrow testing
- Breast ultrasound
- CA 15-3 (blood test for breast cancer)
- CA 125 (blood test for ovarian cancer)
- CEA (blood test for colon cancer)
- Carotid Doppler
- Chest X-ray
- Colonoscopy
- Echocardiogram (ECHO)
- Electrocardiogram (EKG, ECG)
- Fasting blood glucose test
- Flexible sigmoidoscopy
- Hemocult stool analysis
- Mammography
- Pap smear
- PSA (blood test for prostate cancer)
- Serum cholesterol test for HDL and LDL levels
- Serum protein electrophoresis (blood test for myeloma)
- Skin cancer biopsy
- Stress test on a bicycle or treadmill
- Thermography
- ThinPrep pap test
- Virtual colonoscopy

For more information,  
talk with your  
benefits counselor.

ColonialLife.com

For cost and complete details, see your Colonial Life benefits counselor. Applicable to certificate number GMB1.0-C-CA-R. This is not an insurance contract and only the actual certificate provisions will control.

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# Group Hospital Confinement Indemnity Insurance Plan 1



Group Medical Bridge<sup>SM</sup> insurance can help with medical costs associated with a hospital stay that your health insurance may not cover. These benefits are available for you, your spouse and eligible dependent children.

**Hospital confinement benefit** ..... \$ 1000 per day  
Maximum of one day per covered person per calendar year

### Health savings account (HSA) compatible

This plan is compatible with HSA guidelines. This plan may also be offered to employees who do not have HSAs.

Colonial Life & Accident Insurance Company's Group Medical Bridge offers an HSA compatible plan in most states.

For more information,  
talk with your  
benefits counselor.

ColonialLife.com

### EXCLUSIONS

We will not pay benefits for losses which are caused by: cosmetic surgery, dental procedures, felonies or illegal occupations, intoxicants or controlled substances, pregnancy of a dependent child, psychiatric or psychological conditions, suicide, intentional injuries, war, armed forces service or giving birth within the first nine months after the certificate effective date. We will not pay benefits for hospital confinement of a newborn child following his or her birth. However, we will pay for a newborn's hospital confinement (following birth) which is the result of a covered sickness or covered accident. We will not pay benefits for loss during the first 12 months after the effective date due to a pre-existing condition, which means a sickness or physical condition for which a covered person was diagnosed or treated within 12 months before the certificate effective date.

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# Group Hospital Confinement Indemnity Insurance Health Screening Benefit



Group Medical Bridge<sup>SM</sup> insurance's health screening benefit can help pay for health and wellness tests you have each year.

**Health screening benefit** ..... **\$50 per day**  
Maximum of one day per covered person per calendar year

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- Chest X-ray
- Colonoscopy
- Echocardiogram (ECHO)
- Electrocardiogram (EKG, ECG)
- Fasting blood glucose test
- Flexible sigmoidoscopy
- Hemocult stool analysis
- Mammography
- Pap smear
- PSA (blood test for prostate cancer)
- Serum cholesterol test for HDL and LDL levels
- Serum protein electrophoresis (blood test for myeloma)
- Skin cancer biopsy
- Stress test on a bicycle or treadmill
- Thermography
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- Virtual colonoscopy

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ColonialLife.com

For cost and complete details, see your Colonial Life benefits counselor. Applicable to certificate number GMB1.0-C-CA-R. This is not an insurance contract and only the actual certificate provisions will control.

CA LIC#: \_\_\_\_\_

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Thank you very much for your continued support!

Please do not hesitate to call us at  
**1-866-755-6651 (Select Option 1)** or email  
[\*\*CharterLIFE@brmsonline.com\*\*](mailto:CharterLIFE@brmsonline.com) .



# Coversheet

## Approval of New Board Policies

**Section:** XI. Policy Development  
**Item:** A. Approval of New Board Policies  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** EACS -3035 Investment Policy.pdf  
EACS 4005 - Salary Determination Policy.pdf  
EACS 4135 - External County Employment Policy.pdf  
EACS - 5060 Artificial Intelligence (AI) Use Policy for Students.pdf

**BUSINESS/NON-INSTRUCTIONAL****3040-EA**

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**INVESTMENT POLICY****OBJECTIVES**

Excel Academy Charter School's (EACS) primary objectives when investing excess cash are, in order,

1. Preservation of principal
2. Provision of any required liquidity, and
3. Provision of a competitive investment yield within all constraints in this investment policy.

EACS's Chief Business Officer or designee will review its cash flow requirements and determine the daily liquidity required for working capital. Funds not needed for working capital may be invested in a managed portfolio of immediate liquid and fixed-income securities within the guidelines below.

**INVESTMENT GUIDELINES****1. Approved Instruments**

Then, EACS's funds will be invested only in immediate liquid and fixed-income instruments denominated and payable in U.S. dollars. Only the following investment instruments are considered appropriate:

- The investment pool managed by the County Treasurer-Tax Collector of the county where the School's authorizer is located
- Depository accounts at one or more FDIC-insured banking institutions
- Money market instruments, interest savings accounts, and certificates of deposits

**2. Maturity / Portfolio Duration**

The final maturity of each security within the portfolio shall be at most 24 months, and the portfolio's weighted average maturity will be at most 12 months.

**3. Segregation of Duty: Audit and Custody Requirements**

The investment manager, portfolio reporting provider, and asset custodian should be legally independent entities from one another. To assess the effectiveness of their internal controls relevant to an audit of the Company's financial statements, each must provide a copy of their Type II Service Organization Control Report 1 (SOC 1) annually.

## **BUSINESS/NON-INSTRUCTIONAL**

**3040-EA**

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### **INVESTMENT POLICY**

#### **4. Accounting, Risk, Compliance and Performance Measurement & Reporting**

The investment manager will meet with the Chief Financial Officer or a designee at least annually and be available for same-day telephone contact within regular business hours. The portfolio's investment performance will be measured against the Company's preferred benchmark.

Daily, the investment manager will provide statements of transactions and market valuation of portfolio assets on a security-by-security and portfolio-wide basis compliant with all applicable accounting standards.

#### **5. Invest Reviews**

The Executive Director/CEO or designee will review reports on investment performance and present them to the Board of Directors promptly, or at least when financial statements are presented to the Board.

**PERSONNEL SERVICES****4005-EACS****SALARY DETERMINATION POLICY**

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Excel Academy Charter School (“EACS” or the “Charter School”) creates an environment of engagement and collaboration. The Human Resources team works hard to support and advocate for its staff in regards to compensation through frequent compensation analysis and data review. Staff should always feel empowered to discuss details of employment with applicable parties while remaining mindful of all salary determination policies.

Certificated General and Special Education teaching staff, Administrators, Pupil Support, Site Management, Certificated Management and Classified employees are placed on the appropriate salary schedule according to job classification.

At the time of hiring, all full-time employees are placed on a salary schedule based on several factors including, but not limited to:

- Verification of earned college degree (Bachelors or Masters) from an accredited college
- Verification of completed qualifying college semester units (or equivalent) for appropriate placement on the salary schedule
- Verification of additional mandatory appropriate credentialing according to job classification
- Verification of applicable years teaching prior to employment with Excel Academy Charter School will be honored up to (5) years unless otherwise approved by the Executive Director
  - Administration, Certificated Specialist, Classified and Management prior years will be honored based on the duties as assigned, experience level, qualifications and based on approval of the Executive Director and Board and Directors.

Full-time and part-time employees are eligible for a step increase if they have been in an active status for a minimum of seventy-five percent (75%) of the previous school year. Employees who have not been in active working status for at least seventy-five percent (75%) of the previous school year will remain at their step from the current school year. The 75% ratio will be based on the specific work year calendar as assigned.

As a public school, eligibility for compensation analysis beyond the annual budgeted standard will **ONLY** be based on changes to the role and duties as assigned or changes to the criteria in qualifications, or credentialing as deemed appropriate by the school. Changes to duties as assigned or in qualification, or credentialing criteria must be made only during applicable strategic planning periods and must be approved by the Executive Director and Board of Directors. This eligibility is also based on review of the budget and appropriate approval from the Executive Director and Board of Directors.

## **PERSONNEL SERVICES**

**4005-EACS**

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### **SALARY DETERMINATION POLICY**

Under applicable circumstances the Executive team along with the Board of Directors can approve additional monetary incentives in relationship to the overall school budget

**PERSONNEL SERVICES****4135-EACS****EXTERNAL COUNTY EMPLOYMENT POLICY**

Excel Academy Charter Schools (EACS) adopts this policy to outline the parameters in which external county employment work accommodations may be approved. The purpose of this policy is to define the expectations and responsibilities of applicable parties while maintaining efficiency for the school.

Employees must provide sixty (60) days' written notice to the Director of Human Resources if they plan to move outside of the appropriate servicing counties of Excel Academy Charter Schools. Employees who move outside of the schools servicing counties may be subject to disciplinary actions up to termination from their at-will employment.

Additionally, other than attending professional development, conferences or training, employees may not perform any work out of state without prior written approval from the School, as this may require the School to treat the employee as an out of state worker and subject the School to the employment laws of the out of state location.

Employees who remain domiciled in California (i.e. military orders or transfers where residency is maintained in California) may not be considered to be external county employees, subject to the laws of the state in which the employee resides.

External County Employment Request & Approval Process

The approval of each external county employment accommodation shall be made on a case-by-case basis at the discretion and recommendation from the Executive Director to the Board of Directors. The School reserves the right to approve or deny any external county employment request based on the nature of the position and the assurance of successful remote effectiveness. External county employment might not be feasible within some departments or for certain positions within the School.

**Eligibility**

In order for external county work to be considered, the employee must successfully complete a probationary period as determined by the School that's typically measured with an employee probationary evaluations. The Executive Director with approval from the Board of Directors; must determine that the work can be successfully completed out of county and cannot cause any inconvenience or hardship to the School.

If the employee is granted employment in an external county, they shall be permitted to work under the following conditions:

- The nature of the work to be performed is operationally feasible

**PERSONNEL SERVICES****4135-EACS****EXTERNAL COUNTY EMPLOYMENT POLICY**

- In the event of required in-person scheduled events, conferences, and meetings the employee must be willing to travel. These required employer scheduled events will be determined by the Executive Director and can be added and removed at the Executive Directors discretion
- The employee must abide by the employer's set working hours regardless of their time zone location.
- The employee will be required to remain available for communication via phone and email regardless of timezone zone.
- The overall quality and quantity of work performed remains within the School's standards throughout external county work accommodations the employee agrees to adhere to all existing and future policies provided by the School throughout the duration of their external county employment arrangement, including safety expectations and timekeeping expectations, and meal and rest breaks if applicable
- The employee acknowledges that failure to follow the School's existing and future policies, rules, and procedures may result in termination of the remote work arrangement and/or disciplinary action

A complete list of expectations and eligibility criteria will be provided to the employee by the human resources department. Under unique circumstances (pandemics, inclement weather, etc) exceptions to these eligibility requirements may be made at the discretion of the school. In the event of unique unforeseeable circumstances, the staff member should anticipate coverage options to be available in their absence.

**Travel Expenses and Reimbursements**

As a California public school, Excel Academy is a steward of public funds; this may include justifying the necessity for staffing that may be located outside of our servicing counties. In order to retain and obtain highly qualified staff in certain positions it may be required to extend accommodation to staff outside of our servicing counties. The justification of necessity is recommended by the Executive Director and must be approved by the Board of Directors.

Required work related travel expenses should always follow Excel Academy Charter Schools travel policies and the most financially responsible options for transportation and lodging must be utilized. All travel budgets in relation to out of county travel will be analyzed annually to justify sustainability of accommodation.



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**ARTIFICIAL INTELLIGENCE USE POLICY FOR STUDENTS**

Excel Academy Charter Schools and its programs (“EACS” or the “Charter School”) recognize the potential both positively and negatively of artificial intelligence (AI) in education. To ensure responsible and ethical use of AI tools by students. The following policy outlines the principles, permitted use, steps for ethical use, and consequences for violations.

**Guiding Principles:**

AI should be employed to support and enrich the learning experience, promote student and staff well-being, and enhance administrative functions while aligning with educational goals and values. Excel Academy Charter Schools upholds the following guiding principles for AI use in education for students:

1. **Academic Integrity:** AI should be used to support learning and not to undermine the integrity of student work.
2. **Accountability:** Students are responsible for their actions when utilizing AI tools, and acknowledging the potential consequences that may ensue. These principles collectively underpin a culture of responsible and ethical AI use within our educational community.

**Support Provided:**

EACS Teachers are committed to educating students about the responsible use of AI, which may include the following objectives and strategies:

- Clarify the appropriate and inappropriate uses of AI tools within the context of student work products.
- Integrate discussions on the ethical use of AI, including potential biases and limitations of AI tools.
- Provide clear guidelines on when and how AI can be used depending on the assignment.
- Encourage critical thinking and verify accuracy of any information generated by AI tools.
- Educate students on data privacy and the importance of not sharing personal information with AI systems.
- Ensure that AI use aligns with educational goals, such as supporting student agency and promoting critical thinking.
- Teach students about the responsible use of AI, including recognizing and reporting misinformation.
- Provide safety cautions about sharing personal data with AI bots and using them to invade others' privacy.
- Instruct students how to cite appropriate sources for all text and images used in writing.

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## **ARTIFICIAL INTELLIGENCE USE POLICY FOR STUDENTS**

### **Permitted Use:**

1. Educational Purposes Only

### **Steps to Ensure Ethical Use:**

- AI tools may only be used for educational activities, such as research, learning enrichment, and skill development. Students should approach AI as aids rather than replacements for their own work and decision-making.
- Students at Excel Academy Charter Schools are encouraged to engage in critical thinking when utilizing AI tools, rigorously evaluating the validity and potential biases of the output and recommendations generated, as well as fact-checking AI-generated information with reliable sources.
- It is essential for students to review and adhere to the school's academic honesty policies, including guidelines on the use of AI for research and assignments.
- It is essential to uphold intellectual property rights and privacy regulations.
- Students are empowered to report any ethical concerns or issues related to the use of AI tools promptly to teachers or school administrators, fostering a culture of transparency and accountability within our educational community.

### **Prohibited Use:**

1. Using AI to complete assignments or assessments where it is not allowed or to plagiarize work is forbidden.
2. AI tools must not be used to impersonate individuals or organizations, in a misleading or malicious manner, or to generate content that is unlawful, harmful, offensive, and/or against any Excel Academy policies.
3. AI-generated content should not be used as a substitute for pupil effort or original work. Students are required to use their own efforts to understand the material and produce unique content.
4. Students must not submit or otherwise publish school materials using AI tools. Such materials include (but are not limited to): past papers, textbooks, worksheets, curriculum materials, and other school materials.

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## ARTIFICIAL INTELLIGENCE USE POLICY FOR STUDENTS

Use of AI tools and data/content created using such tools must comply with the following policies: Prevention of Bullying and Unkindness Policy, Behaviour Policy and Acceptable Use Agreement, Academic and Integrity Policy.

### Consequences for Violating the Policy:

Violations of this policy may be considered an ethics violation and will be aligned with our plagiarism policies. Consequences will be clearly laid out and may include warnings, educational remediation, or more severe disciplinary actions depending on the nature of the infraction. The consequences for students who violate the AI use policy can include:

### 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

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**ARTIFICIAL INTELLIGENCE USE POLICY FOR STUDENTS**

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.
  1. A meeting with the ToR, parent, and school administration will be scheduled.
  2. 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.
  3. 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.
  4. The student will be issued a BIP if this is a fourth occurrence of inappropriate AI usage
    - a. Students in grades TK-6: These offenses will be dealt with on a case-by-case manner.
    - b. Students in 7th and 8th grade: MTSS supports will be required and individualized based on the student's curriculum and needs.

# Coversheet

## Local Indicators and Local Control & Accountability Plan (LCAP) 2024-25

**Section:** XII. Public Hearing  
**Item:** A. Local Indicators and Local Control & Accountability Plan (LCAP) 2024-25  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:**  
2024\_Local\_Indicator\_Self-Reflection\_of\_2023-24\_Indicators\_Excel\_Academy\_Charter\_School\_-\_Warner\_20240529 FINAL.pdf  
2024\_Local\_Indicator\_Self-Reflection\_of\_2023-24\_Indicators\_Excel\_Academy\_Charter\_School\_-\_Helendale\_20240529 FINAL.pdf  
2024\_Local\_Control\_and\_Accountability\_Plan\_Excel\_Academy\_Charter\_School\_-\_Warner\_20240529 FINAL.pdf  
2024\_Local\_Control\_and\_Accountability\_Plan\_Excel\_Academy\_Charter\_School\_-\_Helendale\_20240529 FINAL.pdf  
2024\_LCAP\_Annual\_Update\_for\_the\_2023-24\_Excel\_Academy\_Charter\_School\_-\_Warner\_20240530 FINAL.pdf  
2024\_LCAP\_Annual\_Update\_for\_the\_2023-24\_Excel\_Academy\_Charter\_School\_-\_Helendale\_20240530 FINAL.pdf  
Local Indicators and the Local Control and Accountability Plan 2024-2025.pdf  
Excel Academy Charter Schools Public Hearing Notice.pdf

### BACKGROUND:

#### **2024/2025 Local Control and Accountability Plan (LCAP) & Annual Update**

The LCAP is a required annual tool for setting goals and planning actions to meet those goals to improve student performance. EACS has established four goals, actions aligned to each goal, measuring and reporting metrics, and will continue to analyze the effectiveness of each action. The LCAP is adopted annually.

The LCAP Annual Update is intended for the LEA to show measurable outcome data to analyze whether the planned actions aligned with the identified goals were indeed effective in achieving the goals. LEAs must identify if the actions were ineffective and explain the reasons for ineffectiveness and the changes to the action for the upcoming year.

Excel Academy's actions were all identified as effective and will remain actions for the 2024-2025 identified goals.

#### **2024/2025 Local Indicator Self Reflection of 2023/2024 Indicators - Presented to the Governing Board with the LCAP**

*The approved performance standards require an LEA to:*

- *Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.*
- *Report the results as part of a non-consent item at the same public meeting of the local governing board/body at which the Local Control and Accountability Plan (LCAP) is adopted.*
- *Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.*

#### Findings

- EACS progress reflects full implementation in Next Generation Science Standards
- EACS progress reflects full implementation and sustainability in all other assessed areas (i.e. core subjects, ELD, CTE, VAPA, and World Languages)
- Narratives accurately depict the progress EACS is making aligned to all of the state priorities



## 2024-25 Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
Excel Academy Charter School - Warner	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

### Introduction

The California State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area.

This template is intended as a drafting tool and based on the Local Performance Indicator Quick Guide published by CDE in January 2024.

### Performance Standards

The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at the same public meeting of the local governing board/body at which the Local Control and Accountability Plan (LCAP) is adopted.
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

### Local Indicators

The local indicators address the following state priority areas:

#### **Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)**

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)



Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA's Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the "good repair" standard (including deficiencies and extreme deficiencies)

## **Implementation of State Academic Standards (LCFF Priority 2)**

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

### **Parent and Family Engagement (LCFF Priority 3)**

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same public meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

### **School Climate (LCFF Priority 6)**

The LEA administers an annual local climate survey that captures a valid measure of student perceptions of school safety and connectedness, in at least one grade within each grade span(s) the LEA serves (e.g., TK-5, 6-8, 9-12), and reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and to educational partners and the public through the Dashboard.

### **Access to a Broad Course of Study (LCFF Priority 7)**

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)**

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

# Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

## Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Academic Year	Total Teaching FTE	Clear	Out-of-Field	Intern	Ineffective	Incomplete	Unknown	N/A
2021-2022	65.6	40%	58.3%	0.0%	0.0%	0.4%	0.0%	1.4%

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The “Good Repair” Standard (Including Deficiencies and Extreme Deficiencies)	0

## Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

### **OPTION 1: Narrative Summary (Limited to 3,000 characters)**

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) – Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics – Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language

Excel Academy Charter School (EACS) delivers a high-quality model of education rooted in personalized learning, flexible schedules, and proven multi-tiered systems of support for all TK-12 grade students. EACS offers students various equity based curriculum options that are vetted for standards alignment and a high level of rigor. Teachers, students, and parents consistently collaborate to properly pace and design an instructional program to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. EACS gathers baseline data from internal assessments, such as the i-Ready benchmark diagnostic assessments in English language arts (ELA) and mathematics, the English Language Proficiency Assessments for California (ELPAC), and the California Assessment of Student Performance and Progress (CAASPP) results. The goal of EACS is to increase the percentage of students who are meeting or exceeding standards in both ELA and math by 2% each year. All assessment results are regularly presented to the local governing board, to educational partners, and through the California School Dashboard. EACS has established baseline data of college and career readiness and strives to increase this by 2% annually. EACS aims for students to complete all standards in ELA, math, science, social studies, visual and performing arts, physical education, health, and world languages while working to be creative and complex thinkers, effective communicators, community and global participants, and empowered, independent learners.

#### Mission Statement -

Excel Academy Charter School 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.

## Implementation of State Academic Standards (LCFF Priority 2)

### OPTION 2: Reflection Tool

#### Recently Adopted Academic Standards and/or Curriculum Frameworks

1. Rate the LEA’s progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards				4	
History-Social Science					5

2. Rate the LEA’s progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards				4	
History-Social Science					5

**3. Rate the LEA’s progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).**

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards				4	
History-Social Science					5

**Other Adopted Academic Standards**

**4. Rate the LEA’s progress implementing each of the following academic standards adopted by the state board for all students.**

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Career Technical Education					5
Health Education Content Standards					5
Physical Education Model Content Standards					5
Visual and Performing Arts					5
World Language					5

## Support for Teachers and Administrators

### 5. Rate the LEA’s success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole					5
Identifying the professional learning needs of individual teachers					5
Providing support for teachers on the standards they have not yet mastered					5

### Optional Narrative (Limited to 1,500 characters)

#### 6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.

All English Learner (EL) students complete assigned targeted ELD curriculum and virtual live instruction that is taught by a Crosscultural, Language, and Academic Development (CLAD) credentialed educator. EL students receive both asynchronous instruction through online programs and synchronous, small group designated instruction. For asynchronous work, EL students in grades K-3 utilize Imagine Language and Literacy, and students in grades 4-12 complete lessons through English 3D with support from their EL teacher. In addition to the assigned ELD online curriculum and designated instruction, Long-Term English Learners (LTELs) receive individualized intervention through the Student Success Team (SST) to gain English proficiency.

ETL science courses are offered to students in grades 7-8. Students will be using the Bright Thinker curriculum along with integrated NGSS standards and personalized lab kits that will provide students a hands-on opportunity to generate problem solving and answer scientific questions. Students in grades 9-12 also participate in ETL courses using Bright Thinker curriculum (i.e. biology, chemistry, and physics).

## Parental Involvement and Family Engagement (LCFF Priority 3)

### Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education’s (CDE’s) Family Engagement Toolkit: <sup>1</sup>

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.



The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

### **Instructions**

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
  - 1 – Exploration and Research
  - 2 – Beginning Development
  - 3 – Initial Implementation
  - 4 – Full Implementation
  - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

### **Sections of the Self-Reflection Tool**

## Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.	5
2. Rate the LEA's progress in creating welcoming environments for all families in the community.	5
3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children.	5
4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.	5

### Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Excel Academy Charter School (EACS) believes in fostering strong educational partnerships between the school, parents, students, and all educational partners through continued communication, collaboration, and transparency. EACS values educational partner input to reflect on the school's overall progress, successes, continuous improvement, and to identify and establish the next steps to drive instruction, school-wide goals, and student learner outcomes. Building strong connections with students and parents leads to increased student engagement, learning, and achievement. The dedication of the EACS staff has ensured consistent and valued communication between all educational partners. The number one priority of EACS is the success of all students academically, socially, and emotionally. Through our systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the input survey results, parents and students agree that EACS is dedicated to providing an education that denotes excellence.

Overall Satisfaction Report: Based on 351 parent/guardian responses:

98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)

98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)

98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)

99.4% of survey respondents agree that EACS clearly communicates academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)

Overall Satisfaction Report: Based on 123 student responses (grades 6-12)

96.7% of survey respondents agree that their teacher cares about their education and is committed to helping them succeed.

95.1% of survey respondents agree that the curriculum provides challenging grade level instruction and assessments of their academic progress, and students feel safe and welcome to discuss their progress with their teachers.

95.1% of survey respondents agree that EACS does a great job communicating with students.

Meaning: Overall high satisfaction rate with the school program.

Use: EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and by providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback and analyze the areas that can be maintained and improved upon.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

Based on the analysis of the positive educational partner feedback and collected data, EACS will continue to implement the proven successful communicative practices in place to keep educational partners informed and connected to student education. EACS is driven to staying on top of the latest trends in education and communication platforms to provide a consistent, open line of communication with all educational partners. EACS is always focused on building participation at SSC, ELAC, and PAC meetings which will remain an area of improvement.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

EACS is committed to encouraging parental participation and involvement by providing flexible, personalized learning through a customized course of study that will educate, motivate, and instill a love of learning in each individual student. Parents are provided with training and learning opportunities, in addition to workshops on a variety of topics, for example, EL progress and the reclassification process, parent portal resources, webinars, curriculum menus, Parent Summit informational, Parent Power-Up education events, Back to School events, and teacher/parent training. Teachers and parents work closely to foster a positive relationship that maintains high expectations and promotes academic excellence for all students creating the next generation of leaders. Parents are informed of all communication tools that are available to provide them direct access to their teachers, staff, resources, and all school related meetings. All school related notifications, meeting agendas and minutes, approved policies, informational meetings, and community events are readily made available through Beehively (main platform for communication) and the EACS website and handbook. The LEA's Title 1 Coordinator, Intervention Coordinator, and school counselors actively continue to reach out to homeless and foster youth, and students needing academic and social emotional support. Parents/guardians are informed well in advance and encouraged to attend all quarterly SSC, ELAC, and PAC meetings. The minutes, agendas, and recordings are posted on the EACS website. EACS is working to find ways to enhance and encourage more parent/guardian participation in SSC, ELAC, and PAC meetings. EACS is moving in the direction of providing parents/guardians and students opportunities to promote and shed light on multicultural awareness by focusing on heritage, customs, and traditions through discussions and presentations that will inspire greater attendance.

## Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families.	5
6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home.	5
7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.	5
8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.	5

### Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

EACS' commitment to encouraging parental involvement, by developing a trusting and respectful relationship between the school staff and families, is important to building and sustaining positive relationships. EACS develops a strong school-home partnership through the use of communication tools that provide parents with access to the student's teacher, current information about the school, access to students' academic information through a parent portal, opportunities to participate and provide input in teacher-parent/student meetings, parent meetings, and governing board meetings. All applicable notifications are posted on the school website and in the parent handbook. A part of the role of the counselor includes communicating with educational partners about their legal rights. Our Intervention Coordinator shares Title I and Title III related parent rights, applicable policies, and encourages education partnership participation. In conformity with Senate Bill 1375, the school posts information on the school website identifying the school's Title IX/Uniform Complaint Procedure Coordinator, the rights of students and the responsibilities of schools, and a description of how to file a complaint. The school website and the parent/student handbooks contain information about the Annual Notice of Uniform Complaint Procedures. The Notice of Procedural Safeguards is provided to parents of students with an IEP on an annual basis. The notice is provided electronically by email in English or Spanish and is also offered to parents at every IEP meeting. If the parent is a non-native English speaker, a translator is present to provide translation of the document. Parents/guardians have the opportunity to communicate with their students' teachers on a regular basis and are encouraged to reach out through email and by phone to set-up meetings

- Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

Based on the analysis of educational partner input, EACS will continue to focus on partnership and student outcome improvement by offering additional parent education opportunities both in person and virtual, annual surveys, and SSC, ELAC, and PAC meetings.

- Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

EACS' LCAP Goal 3 focuses specifically on establishing connections and partnerships with our families and the surrounding community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement. The teacher-parent-student relationship is at the core of student success. EACS will provide students with equity based instruction and the necessary individualized resources, interventions, and support that is critical for growth and progress while keeping parents/guardians informed and involved.

### Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.	5
2. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.	5
3. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.	5
4. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.	5

### Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

Educational Partner Input data:  
 2020-21: 66 Educational Partner Input Survey Participants  
 2021-22: 220 Educational Partner Input Survey Participants  
 2022-23: 304 Educational Partner Input Survey Participants  
 2023-24: 351 Educational Partner Input Survey Participants

EACS is focused on providing effective and meaningful communication that will provide all educational partners opportunities for input in decision making that concerns the equity based education and instruction of all students, as well as the quality of the school program. Communication about opportunities to provide input is provided through social media platforms, including Beehively, as well as during SSC, ELAC, and PAC meetings. There were 351 participants in the LCAP Parent/Guardian Input Survey and 123 participants in the LCAP Student Input Survey which



was a positive increase in survey respondents from the previous school year. EACS shared the survey results with educational partners during the ELAC and SSC meetings and in the monthly newsletters.

Meaning: There has been an increase of survey participants due to the ongoing efforts of the increase communication to educational partners to participate in providing survey input.

Use: EACS will continue to monitor the level of educational partner participation in input opportunities and continue to research strategies to encourage participation

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making.

EACS annually measures growth and progress by seeking input and feedback from all educational partners through annual surveys, teacher/student/parent meetings, board meetings, and through program participation in SSC, ELAC, and PAC meetings. EACS reports the collected results to all educational partners in order to promote transparency and collaboration. Empowering educational partners to provide input and feedback, and participate in decision making, ultimately creates a positive environment where staff, parents/guardians, students, and members of the community and governing board have the opportunity for their voices to be shared and heard. EACS will continue to discuss best practices and train staff on effective strategies for family communication and outreach that ultimately centers around the need for inclusion, building trust, and collaboration. The ultimate goal is for EACS staff to work alongside educational partners in a manner that leads to a positive and successful school environment where students thrive and become lifelong learners.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

Although the survey results did not indicate or reveal less engagement from underrepresented families, communication remains a top priority by focusing on strengthening collaboration and participation of all families by providing meaningful in-person and virtual support, guidance, and resources. Through multiple measures of communication, in order to seek input for decision making, EACS will reach out to all parents/guardians with consistent reminders of upcoming events and meetings to attend. All parents/guardians will be notified in a timely manner if there are concerns regarding student social and academic achievement.

## School Climate (LCFF Priority 6)

### Introduction

The initial design of the Local Control Funding Formula recognized the critical role that positive school conditions and climate play in advancing student performance and equity. This recognition is grounded in a research base demonstrating that a positive school climate directly impacts indicators of success such as increased teacher retention, lower dropout rates, decreased incidences of violence, and higher student achievement.

In order to support comprehensive planning, LEAs need access to current data. The measurement of school climate provides LEAs with critical data that can be used to track progress in school climate for purposes of continuous improvement, and the ability to identify needs and implement changes to address local needs.

### Introduction

LEAs are required, at a minimum, to annually administer a local climate survey. The survey must:

- Capture a valid measure of student perceptions of school safety and connectedness in at least one grade within each grade span the LEA serves (e.g. TK-5, 6-8, 9-12); and
- At a minimum, report disaggregated data by student groups identified in California Education Code 52052, when such data is available as part of the local school climate survey.

Based on the analysis of local data, including the local climate survey data, LEAs are to respond to the following three prompts. Each prompt response is limited to 3,000 characters. An LEA may provide hyperlink(s) to other documents as necessary within each prompt:

**Prompt 1 (DATA):** Describe the local climate survey data, including available data disaggregated by student groups. LEAs using surveys that provide an overall score, such as the California Healthy Kids Survey, are encouraged to report the overall score for all students as well as available student group scores. Responses may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

#### Students in grades 6-12

98% of survey respondents agree that their teacher is available to speak with them when they need guidance.  
 95% of survey respondents agree that the curriculum provides challenging grade level instruction and assessment of their academic progress.  
 93.5% of survey respondents agree that the curriculum and instruction are engaging and they are able to complete the coursework on time.  
 96.7% of survey respondents agree that their teacher cares about their education and is committed to helping them succeed.  
 95.9% of survey respondents feel safe and welcome to meet with their teacher to discuss their progress.  
 96.7% of survey respondents feel overall satisfaction with Excel Academy Charter School.  
 95.1% of survey respondents feel the school does a good job communicating through all forms of communication.  
 94.3% of survey respondents know that they have someone at school who they can talk to (teacher or counselor).

#### Testimonials

"My learning goals are met."  
 "Excel already is helping me learn better and I feel as if my learning goals are already fulfilled."

#### Elementary SEL Survey - Grades TK - 6

83% of survey respondents feel they have an adult to talk to when they are upset (fearful, angry, or sad).  
 100% of survey respondents believe they have a trusted adult who will help them in any circumstance.  
 100% of survey respondents believe their students have 1 or 2 people who they consider to be friends.  
 100% of survey respondents believe their students have an adult to talk to when they are upset (fearful, angry, or sad).  
 76% of survey respondents are aware of Social Emotional Learning (SEL) groups provided by Excel Academy.

#### Testimonials:

"We love the social emotional classes on Wednesdays."

#### Students in grades K - 12 Intervention Feedback

100% of survey respondents agree that their teacher communicates positively and professionally with students and parents.  
 95% of survey respondents agree that they feel a sense of belonging and part of the classroom community.  
 93% of survey respondents feel the class helped them grow academically.

#### Testimonials:

"I appreciate the level of communication teachers maintain with parents and their efforts to engage students."  
 "The teacher communicates with parents often. My student loves class and is very engaged in it."  
 "This helped him improve significantly."



**Prompt 2 (MEANING):** Describe key learnings, including identified needs and areas of strength determined through the analysis of data described in Prompt 1, including the available data disaggregated by student group.

MEANING: The survey results are shared with educational partners to address trends in the input during the ELAC, SSC, and all staff meetings. There was no input that directly affected the LCAP goals and actions. The most consistent trend we found was praise for EACS and appreciation for all of the resources provided to families.

**Prompt 3 (USE):** Describe any changes to existing plans, policies, or procedures that the LEA determines necessary in order to address areas of need identified through the analysis of local data and the identification of key learnings. Include any revisions, decisions, or actions the LEA has, or will, implement for continuous improvement purposes.

USE: EACS takes pride in focusing on continuous improvement by analyzing current curriculum options, internal assessments, and educational partner feedback to ensure students are being provided the best education that serves their individual needs.

## Access to a Broad Course of Study (LCFF Priority 7)

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

EACS offers students across all grade levels innovative personalized programs and pathways that offer a broad course of study, flexibility, and independent learning developed from data analysis of assessment and academic portfolios built on integrity, accountability and compliance. With the support and guidance of a credentialed teacher, students build a customized learning plan based on individual educational goals. All 8th-12th students meet with their assigned High School Counselor yearly to review graduation progress, select courses that will ensure they meet their academic goals, and create a detailed in depth Course of Study that indicates specifically the courses the student will be studying and the vetted curriculum they will be using. A pacing guide for each assigned subject is then created by the teacher who will monitor the completion of the assignments and assessments outlined. All students have access to core subject courses, CTE and elective courses, the opportunity to take advanced high school courses (Honors and AP), credit recovery, and can participate in concurrent enrollment. Students in grades 7-12 are offered live, weekly hybrid courses in all core subjects. The High School Counselor and High School Principal initiate a general education meeting to follow each eighth grade end-of-year IEP to ensure that the students have a four-plan in place for high school. Any SPED curricular questions are addressed with the Case Managers who implement IEP goals.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

All students have access to a broad course of study, internal and state assessments, and oversight from credentialed educators due to EACS' personalized learning model. Students who are receiving interventions have access to additional academic resources and tutoring. The EACS High School Counselor and teacher work together to plan the approved courses and develop four year high school plans. The High School Principal and School Counselor monitor student enrollment in the approved courses and work with the student and parents to create a plan based on student interests, goals, and grade-level expectations. When deemed appropriate and based on internal and state assessment results, the Intervention Coordinator works in conjunction with the Special Education Team, High School Counselor, teacher, and Administrative Team to ensure that the student has proper resources and interventions in place to strengthen skills and close any learning gaps. EACS tracks students' volunteer and work-

based hours through remote learning opportunities for the Completer courses. EACS currently offers three CTE pathways: Business Marketing, Digital Media and Photography, and Patient Care. As a result of the collaboration, guidance, and support in place, EACS continues to see great success which is reflected in our high graduate rate and an increased number of students moving on to community colleges, four year colleges, and trade schools.

- Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

Since EACS does not have a physical location, providing students with hands-on experience in CTE Capstone courses can be a challenge. However, we have overcome that barrier by encouraging dual enrollment in community colleges where the resources for hands-on instruction and training are readily available.

- In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

To ensure access to a broad course of study and equity based instruction for all students, EACS has replaced Imagine Language and Literacy with Lexia English for EL students in order to have stronger support aligned with ELPAC score report levels and the ELD Framework. EACS has also added NoRedInk (premium) to enhance instructional writing and grammar support, added DreamBox Math as a targeted intervention, refined curriculum menu options for students across all grade levels, and added an additional secondary math intervention course.

### Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)

Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.

- Rating Scale (lowest to highest):
- 1 - Exploration and Research Phase
  - 2 - Beginning Development
  - 3 - Initial Implementation
  - 4 - Full Implementation
  - 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who pose a danger to other district					

<b>Coordinating Instruction</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

### **Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

**Assess the degree of implementation of coordinated service program components for foster youth in your county.**

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.					



## 2024-25 Local Performance Indicator Self-Reflection

Local Educational Agency (LEA)	Contact Name and Title	Email and Phone
Excel Academy Charter School - Helendale	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

### Introduction

The California State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area.

This template is intended as a drafting tool and based on the Local Performance Indicator Quick Guide published by CDE in January 2024.

### Performance Standards

The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at the same public meeting of the local governing board/body at which the Local Control and Accountability Plan (LCAP) is adopted.
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

### Local Indicators

The local indicators address the following state priority areas:

#### **Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)**

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA's Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the "good repair" standard (including deficiencies and extreme deficiencies)

## **Implementation of State Academic Standards (LCFF Priority 2)**

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.



### **Parent and Family Engagement (LCFF Priority 3)**

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same public meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

### **School Climate (LCFF Priority 6)**

The LEA administers an annual local climate survey that captures a valid measure of student perceptions of school safety and connectedness, in at least one grade within each grade span(s) the LEA serves (e.g., TK-5, 6-8, 9-12), and reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and to educational partners and the public through the Dashboard.

### **Access to a Broad Course of Study (LCFF Priority 7)**

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)**

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

### **Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

## Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

### Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at <https://www.cde.ca.gov/ds/ad/tamo.asp>.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Academic Year	Total Teaching FTE	Clear	Out-of-Field	Intern	Ineffective	Incomplete	Unknown	N/A
2021-2022	61.1	50.3%	47.2%	0.0%	0.0%	0.8%	0.0%	1.6%

Access to Instructional Materials	Number	Percent
Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home	0	0

Facility Conditions	Number
Identified Instances Where Facilities Do Not Meet The “Good Repair” Standard (Including Deficiencies and Extreme Deficiencies)	0

## Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

### **OPTION 1: Narrative Summary (Limited to 3,000 characters)**

In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) – Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics – Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language

Excel Academy Charter School (EACS) delivers a high-quality model of education rooted in personalized learning, flexible schedules, and proven multi-tiered systems of support for all TK-12 grade students. EACS offers students various equity based curriculum options that are vetted for standards alignment and a high level of rigor. Teachers, students, and parents consistently collaborate to properly pace and design an instructional program to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. EACS gathers baseline data from internal assessments, such as the i-Ready benchmark diagnostic assessments in English language arts (ELA) and mathematics, the English Language Proficiency Assessments for California (ELPAC), and the California Assessment of Student Performance and Progress (CAASPP) results. The goal of EACS is to increase the percentage of students who are meeting or exceeding standards in both ELA and math by 2% each year. All assessment results are regularly presented to the local governing board, to educational partners, and through the California School Dashboard. EACS has established baseline data of college and career readiness and strives to increase this by 2% annually. EACS aims for students to complete all standards in ELA, math, science, social studies, visual and performing arts, physical education, health, and world languages while working to be creative and complex thinkers, effective communicators, community and global participants, and empowered, independent learners.

#### Mission Statement -

Excel Academy Charter School 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.

## Implementation of State Academic Standards (LCFF Priority 2)

### OPTION 2: Reflection Tool

#### Recently Adopted Academic Standards and/or Curriculum Frameworks

1. Rate the LEA’s progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards				4	
History-Social Science					5

2. Rate the LEA’s progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards				4	
History-Social Science					5

**3. Rate the LEA’s progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).**

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
ELA – Common Core State Standards for ELA					5
ELD (Aligned to ELA Standards)					5
Mathematics – Common Core State Standards for Mathematics					5
Next Generation Science Standards				4	
History-Social Science					5

**Other Adopted Academic Standards**

**4. Rate the LEA’s progress implementing each of the following academic standards adopted by the state board for all students.**

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Career Technical Education					5
Health Education Content Standards					5
Physical Education Model Content Standards					5
Visual and Performing Arts					5
World Language					5

**Support for Teachers and Administrators**

**5. Rate the LEA’s success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).**

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Academic Standards	1	2	3	4	5
Identifying the professional learning needs of groups of teachers or staff as a whole					5
Identifying the professional learning needs of individual teachers					5
Providing support for teachers on the standards they have not yet mastered					5

**Optional Narrative (Limited to 1,500 characters)**

**6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.**

All English Learner (EL) students complete assigned targeted ELD curriculum and virtual live instruction that is taught by a Crosscultural, Language, and Academic Development (CLAD) credentialed educator. EL students receive both asynchronous instruction through online programs and synchronous, small group designated instruction. For asynchronous work, EL students in grades K-3 utilize Imagine Language and Literacy, and students in grades 4-12 complete lessons through English 3D with support from their EL teacher. In addition to the assigned ELD online curriculum and designated instruction, Long-Term English Learners (LTELs) receive individualized intervention through the Student Success Team (SST) to gain English proficiency.

ETL science courses are offered to students in grades 7-8. Students will be using the Bright Thinker curriculum along with integrated NGSS standards and personalized lab kits that will provide students a hands-on opportunity to generate problem solving and answer scientific questions. Students in grades 9-12 also participate in ETL courses using Bright Thinker curriculum (i.e. biology, chemistry, and physics).

**Parental Involvement and Family Engagement (LCFF Priority 3)**

**Introduction**

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education’s (CDE’s) Family Engagement Toolkit: <sup>1</sup>

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

### **Instructions**

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.
3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):
  - 1 – Exploration and Research
  - 2 – Beginning Development
  - 3 – Initial Implementation
  - 4 – Full Implementation
  - 5 – Full Implementation and Sustainability
4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.
5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

### **Sections of the Self-Reflection Tool**



## Section 1: Building Relationships Between School Staff and Families

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families.	5
2. Rate the LEA's progress in creating welcoming environments for all families in the community.	5
3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children.	5
4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families.	5

### Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Excel Academy Charter School (EACS) believes in fostering strong educational partnerships between the school, parents, students, and all educational partners through continued communication, collaboration, and transparency. EACS values educational partner input to reflect on the school's overall progress, successes, continuous improvement, and to identify and establish the next steps to drive instruction, school-wide goals, and student learner outcomes. Building strong connections with students and parents leads to increased student engagement, learning, and achievement. The dedication of the EACS staff has ensured consistent and valued communication between all educational partners. The number one priority of EACS is the success of all students academically, socially, and emotionally. Through our systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the input survey results, parents and students agree that EACS is dedicated to providing an education that denotes excellence.

Overall Satisfaction Report: Based on 351 parent/guardian responses:

98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)

98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)

98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)

99.4% of survey respondents agree that EACS clearly communicates academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)

Overall Satisfaction Report: Based on 123 student responses (grades 6-12)

96.7% of survey respondents agree that their teacher cares about their education and is committed to helping them succeed.

95.1% of survey respondents agree that the curriculum provides challenging grade level instruction and assessments of their academic progress, and students feel safe and welcome to discuss their progress with their teachers.

95.1% of survey respondents agree that EACS does a great job communicating with students.

Meaning: Overall high satisfaction rate with the school program.

Use: EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and by providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback and analyze the areas that can be maintained and improved upon.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

Based on the analysis of the positive educational partner feedback and collected data, EACS will continue to implement the proven successful communicative practices in place to keep educational partners informed and connected to student education. EACS is driven to staying on top of the latest trends in education and communication platforms to provide a consistent, open line of communication with all educational partners. EACS is always focused on building participation at SSC, ELAC, and PAC meetings which will remain an area of improvement.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

EACS is committed to encouraging parental participation and involvement by providing flexible, personalized learning through a customized course of study that will educate, motivate, and instill a love of learning in each individual student. Parents are provided with training and learning opportunities, in addition to workshops on a variety of topics, for example, EL progress and the reclassification process, parent portal resources, webinars, curriculum menus, Parent Summit informational, Parent Power-Up education events, Back to School events, and teacher/parent training. Teachers and parents work closely to foster a positive relationship that maintains high expectations and promotes academic excellence for all students creating the next generation of leaders. Parents are informed of all communication tools that are available to provide them direct access to their teachers, staff, resources, and all school related meetings. All school related notifications, meeting agendas and minutes, approved policies, informational meetings, and community events are readily made available through Beehively (main platform for communication) and the EACS website and handbook. The LEA's Title 1 Coordinator, Intervention Coordinator, and school counselors actively continue to reach out to homeless and foster youth, and students needing academic and social emotional support. Parents/guardians are informed well in advance and encouraged to attend all quarterly SSC, ELAC, and PAC meetings. The minutes, agendas, and recordings are posted on the EACS website. EACS is working to find ways to enhance and encourage more parent/guardian participation in SSC, ELAC, and PAC meetings. EACS is moving in the direction of providing parents/guardians and students opportunities to promote and shed light on multicultural awareness by focusing on heritage, customs, and traditions through discussions and presentations that will inspire greater attendance.

## Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families.	5
6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home.	5
7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes.	5
8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students.	5

### Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

EACS' commitment to encouraging parental involvement, by developing a trusting and respectful relationship between the school staff and families, is important to building and sustaining positive relationships. EACS develops a strong school-home partnership through the use of communication tools that provide parents with access to the student's teacher, current information about the school, access to students' academic information through a parent portal, opportunities to participate and provide input in teacher-parent/student meetings, parent meetings, and governing board meetings. All applicable notifications are posted on the school website and in the parent handbook. A part of the role of the counselor includes communicating with educational partners about their legal rights. Our Intervention Coordinator shares Title I and Title III related parent rights, applicable policies, and encourages education partnership participation. In conformity with Senate Bill 1375, the school posts information on the school website identifying the school's Title IX/Uniform Complaint Procedure Coordinator, the rights of students and the responsibilities of schools, and a description of how to file a complaint. The school website and the parent/student handbooks contain information about the Annual Notice of Uniform Complaint Procedures. The Notice of Procedural Safeguards is provided to parents of students with an IEP on an annual basis. The notice is provided electronically by email in English or Spanish and is also offered to parents at every IEP meeting. If the parent is a non-native English speaker, a translator is present to provide translation of the document. Parents/guardians have the opportunity to communicate with their students' teachers on a regular basis and are encouraged to reach out through email and by phone to set-up meetings.

- Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

Based on the analysis of educational partner input, EACS will continue to focus on partnership and student outcome improvement by offering additional parent education opportunities both in person and virtual, annual surveys, and SSC, ELAC, and PAC meetings.

- Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

EACS' LCAP Goal 3 focuses specifically on establishing connections and partnerships with our families and the surrounding community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement. The teacher-parent-student relationship is at the core of student success. EACS will provide students with equity based instruction and the necessary individualized resources, interventions, and support that is critical for growth and progress while keeping parents/guardians informed and involved.

### Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Practices	Rating Scale Number
1. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making.	5
2. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making.	5
3. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community.	5
4. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels.	5

### Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)

- Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

Educational Partner Input data:  
 2020-21: 66 Educational Partner Input Survey Participants  
 2021-22: 220 Educational Partner Input Survey Participants  
 2022-23: 304 Educational Partner Input Survey Participants  
 2023-24: 351 Educational Partner Input Survey Participants

EACS is focused on providing effective and meaningful communication that will provide all educational partners opportunities for input in decision making that concerns the equity based education and instruction of all students, as well as the quality of the school program. Communication about opportunities to provide input is provided through social media platforms, including Beehively, as well as during SSC, ELAC, and PAC meetings. There were 351 participants in the LCAP Parent/Guardian Input Survey and 123 participants in the LCAP Student Input Survey which

was a positive increase in survey respondents from the previous school year. EACS shared the survey results with educational partners during the ELAC and SSC meetings and in the monthly newsletters.

Meaning: There has been an increase of survey participants due to the ongoing efforts of the increase communication to educational partners to participate in providing survey input.

Use: EACS will continue to monitor the level of educational partner participation in input opportunities and continue to research strategies to encourage participation.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making.

EACS annually measures growth and progress by seeking input and feedback from all educational partners through annual surveys, teacher/student/parent meetings, board meetings, and through program participation in SSC, ELAC, and PAC meetings. EACS reports the collected results to all educational partners in order to promote transparency and collaboration. Empowering educational partners to provide input and feedback, and participate in decision making, ultimately creates a positive environment where staff, parents/guardians, students, and members of the community and governing board have the opportunity for their voices to be shared and heard. EACS will continue to discuss best practices and train staff on effective strategies for family communication and outreach that ultimately centers around the need for inclusion, building trust, and collaboration. The ultimate goal is for EACS staff to work alongside educational partners in a manner that leads to a positive and successful school environment where students thrive and become lifelong learners.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

Although the survey results did not indicate or reveal less engagement from underrepresented families, communication remains a top priority by focusing on strengthening collaboration and participation of all families by providing meaningful in-person and virtual support, guidance, and resources. Through multiple measures of communication, in order to seek input for decision making, EACS will reach out to all parents/guardians with consistent reminders of upcoming events and meetings to attend. All parents/guardians will be notified in a timely manner if there are concerns regarding student social and academic achievement.

## School Climate (LCFF Priority 6)

### Introduction

The initial design of the Local Control Funding Formula recognized the critical role that positive school conditions and climate play in advancing student performance and equity. This recognition is grounded in a research base demonstrating that a positive school climate directly impacts indicators of success such as increased teacher retention, lower dropout rates, decreased incidences of violence, and higher student achievement.

In order to support comprehensive planning, LEAs need access to current data. The measurement of school climate provides LEAs with critical data that can be used to track progress in school climate for purposes of continuous improvement, and the ability to identify needs and implement changes to address local needs.

### Introduction

LEAs are required, at a minimum, to annually administer a local climate survey. The survey must:

- Capture a valid measure of student perceptions of school safety and connectedness in at least one grade within each grade span the LEA serves (e.g. TK-5, 6-8, 9-12); and
- At a minimum, report disaggregated data by student groups identified in California Education Code 52052, when such data is available as part of the local school climate survey.



Based on the analysis of local data, including the local climate survey data, LEAs are to respond to the following three prompts. Each prompt response is limited to 3,000 characters. An LEA may provide hyperlink(s) to other documents as necessary within each prompt:

**Prompt 1 (DATA):** Describe the local climate survey data, including available data disaggregated by student groups. LEAs using surveys that provide an overall score, such as the California Healthy Kids Survey, are encouraged to report the overall score for all students as well as available student group scores. Responses may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

#### Students in grades 6-12

98% of survey respondents agree that their teacher is available to speak with them when they need guidance.  
95% of survey respondents agree that the curriculum provides challenging grade level instruction and assessment of their academic progress.  
93.5% of survey respondents agree that the curriculum and instruction are engaging and they are able to complete the coursework on time.  
96.7% of survey respondents agree that their teacher cares about their education and is committed to helping them succeed.  
95.9% of survey respondents feel safe and welcome to meet with their teacher to discuss their progress.  
96.7% of survey respondents feel overall satisfaction with Excel Academy Charter School.  
95.1% of survey respondents feel the school does a good job communicating through all forms of communication.  
94.3% of survey respondents know that they have someone at school who they can talk to (teacher or counselor).

#### Testimonials

"My learning goals are met."  
"Excel already is helping me learn better and I feel as if my learning goals are already fulfilled."

#### Elementary SEL Survey - Grades TK - 6

83% of survey respondents feel they have an adult to talk to when they are upset (fearful, angry, or sad).  
100% of survey respondents believe they have a trusted adult who will help them in any circumstance.  
100% of survey respondents believe their students have 1 or 2 people who they consider to be friends.  
100% of survey respondents believe their students have an adult to talk to when they are upset (fearful, angry, or sad).  
76% of survey respondents are aware of Social Emotional Learning (SEL) groups provided by Excel Academy.

#### Testimonials:

"We love the social emotional classes on Wednesdays."

#### Students in grades K - 12 Intervention Feedback

100% of survey respondents agree that their teacher communicates positively and professionally with students and parents.  
95% of survey respondents agree that they feel a sense of belonging and part of the classroom community.  
93% of survey respondents feel the class helped them grow academically.

#### Testimonials:

"I appreciate the level of communication teachers maintain with parents and their efforts to engage students."  
"The teacher communicates with parents often. My student loves class and is very engaged in it."  
"This helped him improve significantly."

**Prompt 2 (MEANING):** Describe key learnings, including identified needs and areas of strength determined through the analysis of data described in Prompt 1, including the available data disaggregated by student group.

MEANING: The survey results are shared with educational partners to address trends in the input during the ELAC, SSC, and all staff meetings. There was no input that directly affected the LCAP goals and actions. The most consistent trend we found was praise for EACS and appreciation for all of the resources provided to families.

**Prompt 3 (USE):** Describe any changes to existing plans, policies, or procedures that the LEA determines necessary in order to address areas of need identified through the analysis of local data and the identification of key learnings. Include any revisions, decisions, or actions the LEA has, or will, implement for continuous improvement purposes.

USE: EACS takes pride in focusing on continuous improvement by analyzing current curriculum options, internal assessments, and educational partner feedback to ensure students are being provided the best education that serves their individual needs.

## Access to a Broad Course of Study (LCFF Priority 7)

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

EACS offers students across all grade levels innovative personalized programs and pathways that offer a broad course of study, flexibility, and independent learning developed from data analysis of assessment and academic portfolios built on integrity, accountability and compliance. With the support and guidance of a credentialed teacher, students build a customized learning plan based on individual educational goals. All 8th-12th students meet with their assigned High School Counselor yearly to review graduation progress, select courses that will ensure they meet their academic goals, and create a detailed in depth Course of Study that indicates specifically the courses the student will be studying and the vetted curriculum they will be using. A pacing guide for each assigned subject is then created by the teacher who will monitor the completion of the assignments and assessments outlined. All students have access to core subject courses, CTE and elective courses, the opportunity to take advanced high school courses (Honors and AP), credit recovery, and can participate in concurrent enrollment. Students in grades 7-12 are offered live, weekly hybrid courses in all core subjects. The High School Counselor and High School Principal initiate a general education meeting to follow each eighth grade end-of-year IEP to ensure that the students have a four-plan in place for high school. Any SPED curricular questions are addressed with the Case Managers who implement IEP goals.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

All students have access to a broad course of study, internal and state assessments, and oversight from credentialed educators due to EACS' personalized learning model. Students who are receiving interventions have access to additional academic resources and tutoring. The EACS High School Counselor and teacher work together to plan the approved courses and develop four year high school plans. The High School Principal and School Counselor monitor student enrollment in the approved courses and work with the student and parents to create a plan based on student interests, goals, and grade-level expectations. When deemed appropriate and based on internal and state assessment results, the Intervention Coordinator works in conjunction with the Special Education Team, High School Counselor, teacher, and Administrative Team to ensure that the student has proper resources and interventions in place to strengthen skills and close any learning gaps. EACS tracks students' volunteer and work-



based hours through remote learning opportunities for the Completer courses. EACS currently offers three CTE pathways: Business Marketing, Digital Media and Photography, and Patient Care. As a result of the collaboration, guidance, and support in place, EACS continues to see great success which is reflected in our high graduate rate and an increased number of students moving on to community colleges, four year colleges, and trade schools.

- Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

Since EACS does not have a physical location, providing students with hands-on experience in CTE Capstone courses can be a challenge. However, we have overcome that barrier by encouraging dual enrollment in community colleges where the resources for hands-on instruction and training are readily available.

- In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

To ensure access to a broad course of study and equity based instruction for all students, EACS has replaced Imagine Language and Literacy with Lexia English for EL students in order to have stronger support aligned with ELPAC score report levels and the ELD Framework. EACS has also added NoRedInk (premium) to enhance instructional writing and grammar support, added DreamBox Math as a targeted intervention, refined curriculum menu options for students across all grade levels, and added an additional secondary math intervention course.

## Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)

Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

Coordinating Instruction	1	2	3	4	5
1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including:	[No response required]	[No response required]	[No response required]	[No response required]	[No response required]
a. Review of required outcome data.					
b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps.					
c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of					

<b>Coordinating Instruction</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
their rehabilitation plan or who pose a danger to other district pupils.					
2. Coordinating on development and implementation of triennial plan with all LEAs within the county.					
3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled students.					
4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education.					

### **Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)**

**Assess the degree of implementation of coordinated service program components for foster youth in your county.**

Rating Scale (lowest to highest):

- 1 - Exploration and Research Phase
- 2 - Beginning Development
- 3 - Initial Implementation
- 4 - Full Implementation
- 5 - Full Implementation and Sustainability

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education).					

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth).					
3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes.					
4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding.					
5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information.					
6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers.					
7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type.					

<b>Coordinating Services</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth.					



## Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Warner	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

## Plan Summary [2024-25]

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Excel Academy Charter School (EACS) is a non-classroom based California charter school offering a tuition-free personalized learning independent study model for students in grades TK-12 . Our high-quality, educational program is rooted in flexible learning, personalized schedules, and proven systems of support where credentialed teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student. The three academic path options, Personalized Elementary Path, Personalized Secondary Path, and Virtual Path, allow families to choose the mode of education that best works for the needs of the individual student and parent. For students on the Personalized Elementary and Secondary Paths, students build a customized learning plan based on individual educational goals with the support of their assigned highly-qualified credentialed teacher. In collaboration with the credentialed Teacher of Record (ToR), parents select from a variety of educational resources, services, and materials. Using these educational resources, families build a customized learning experience for their students, tailored to fit their academic, emotional, and social needs. Students on the personalized paths meet face to face and via a variety of platforms throughout the monthly learning periods to ensure students' unique needs are met, and the students are showing academic growth and progress through grade level and state standards. Teachers, students, and parents consistently collaborate to properly pace and design an instructional schedule to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. On the Virtual Path, students in grades 1-8 benefit from a structured virtual classroom environment overseen by a credentialed teacher. Quality grade-level curriculum is used by the teacher to provide direct, daily instruction to students, as well as to assign independent learning activities. Parents/guardians partner with teachers to ensure students complete all assigned learning activities. Every student enrolled in Excel Academy benefits from the expertise, guidance, and oversight of a credentialed teacher who develops a personal learning plan and pacing guides for each subject for their students. Daily and

weekly communication occurs between teachers, parents, and students to ensure academic progress as well as support social and emotional success. Excel Academy operates on a traditional school calendar with regularly scheduled holidays. EACS is accredited by the Western Association of Schools and Colleges (WASC) which is a statement to the community and educational partners that the institution is reputable, student-oriented, focused on quality education and student performance, and committed to ongoing improvement. EACS believes in fostering strong educational partnerships between the school, parents, students, and stakeholders through continued communication, collaboration, and transparency.

Students enrolled in this school reside in urban, suburban, and rural areas throughout Orange, Riverside, and San Diego Counties. Excel Academy serves a diverse community of students and parents due to the nature of independent study. According to the California Department of Education's DataQuest, in 2023-2024 Excel Academy Charter School - Warner reported an enrollment of 967 students. This includes the enrollment of 42% socio-economically disadvantaged, 3.7% English Learners, 9.7% Special Education, .3% Homeless, and .5% Foster Youth. 33.1% of students enrolled in Excel Academy Charter School - Warner are Hispanic.

#### Mission Statement:

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

#### Our Vision:

We are all about CHOICE:

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

## Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

### Excel Academy Charter School's (EACS) Annual Performance Reflections

#### 1) Local and State Assessment Results

As a California Distinguished School, Excel Academy continues to focus on closing the achievement gap and obtaining exceptional student performance by providing equity-based instruction and a broad course of study. The i-Ready diagnostic benchmark assessments, EACS' local assessments, were administered to measure student progress in the fall, winter, and spring during the 2023-2024 school year. Based on an analysis of our i-Ready fall and spring scores in ELA and Math, EACS demonstrated success in decreasing the percentages of

students in tiers 2 & 3 (one or more grade levels below the current grade level). 74.7% of our students are at or above grade level in ELA. Tier 1 (students at or above grade level) grew over 11% since the first diagnostic in September. 68.8% of EACS students are at or above grade level in math. Tier 1 (students at or above grade level) grew by 18% since the first diagnostic in September. Excel Academy attributes the progress and success to the consistent support and guidance of our credentialed teachers, communication between teachers, students, and parents, the consistent completion of the i-Ready personalized lessons, and the interventions in place to provide specific resources, supplements, and live instruction to close learning gaps and strengthen skills.

25% of students in the WIN Intervention Program reached proficiency in the spring in math and reading.

63% of students in the math, ELA, and ELD intervention classes grew by one grade level or more from fall to spring

73% of the EACS identified homeless and foster youth populations, served through general education, are proficient in math and ELA based on the spring i-Ready benchmark assessment data.

The 2022-2023 CAASPP data showed that EACS' participation rate exceeded state requirements, and EACS students continue to exceed county and state percentages in ELA and math.

66% of students met or exceeded standards in ELA. The percentage remained the same from the 2021-2022 test scores.

56% of students met or exceeded standards in math. There is a 2% increase from the 2021-2022 test scores.

In comparison to 59 charter schools with similar demographics and enrollment, EACS ranked 3rd overall in ELA and 1st overall in math.

We attribute the progress and success our students are showing on the state assessments to the consistent communication and collaboration between the staff with the teachers, teachers with the parents and students, and the implementation of interventions and resources that specifically meet the individual needs of each student. Our students are assessed throughout the year, so teachers can make adjustments to their students' plan of instruction. Students are also provided with test prep packets and virtual sessions to help prepare them for the assessments.

2) EACS believes in fostering strong educational partnerships between the school, parents, students, and all educational partners through continued communication, collaboration, and transparency. EACS values educational partner input to reflect on the school's overall progress, successes, continuous improvement, and to identify and establish the next steps to drive instruction, school-wide goals, and student learner outcomes. Building strong connections with students and parents leads to increased student engagement, learning, and achievement. The dedication of the EACS staff has ensured consistent and valued communication between all educational partners. The number one priority of EACS is the success of all students academically, socially, and emotionally. Through our systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the input survey results, parents and students agree that EACS is dedicated to providing an education that denotes excellence.

Overall Satisfaction Report: Based on 351 parent/guardian responses:

98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)

98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)



98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)

99.4% of survey respondents agree that EACS clearly communicates academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)

Overall Satisfaction Report: Based on 123 student responses (grades 6-12)

96.7% of survey respondents agree that their teacher cares about their education and is committed to helping them succeed.

95.1% of survey respondents agree that the curriculum provides challenging grade level instruction and assessments of their academic progress, and students feel safe and welcome to discuss their progress with their teachers.

95.1% of survey respondents agree that EACS does a great job communicating with students.

Meaning: Overall high satisfaction rate with the school program.

Use: EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and by providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback and analyze the areas that can be maintained and improved upon.

3) Excel Academy offered a plethora of opportunities to build student engagement and peer connections through monthly Outdoor Classroom days where students collaborated on hands-on experiments tied to content standards, virtual learning lessons across all core subjects, and field trips throughout Southern California. In addition, students had access to: Social Emotional Learning Lessons led by credentialed teachers to connect with peers and to learn important life skills, Care Solace surveys to better support mental health, theater productions, Coder-Z, eSports, chess club, and Student Council programs. The GATE (Gifted and Talented Education) Program is thriving with students in grades 3-8 participating in engaging, project-based STEM activities throughout the school year. EACS offered GATE testing using the CogAT8 assessments.

4) EACS students in the "What I Need" WIN intervention program showed tremendous growth in six months after retaking the i-Ready assessments. Additional classes were implemented to serve students who need to focus on early reading and foundational math.

5) English Learners were provided with grade level appropriate weekly live instruction at the appropriate grade level in reading, writing, listening, and speaking to build English language fluency. 39% of students in English Language Development (ELD) classes grew by one or more grade levels in six months based on spring i-Ready results. The students enjoyed the sessions and we are looking forward to seeing the progress they have made on the Summative ELPAC assessment.

7) Excel Academy's 0% suspension and expulsion rates and low chronic absenteeism rate of 0.8% is a success that the school takes great pride in.

8) In addition to continuing to increase the school's A-G course offerings, Excel Academy continued to focus on increasing access to A-G courses with an emphasis on our 9th and 10th grade students. With great success, all core A-G required coursework is accessible for A-G completion. EACS introduced additional support for struggling students to meet Algebra 1 requirements and students are on track to complete the next math sequence.

EACS will continue to build educational partner engagement and CA Dashboard data success by:

1) EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback, and analyze the areas that we can maintain and improve upon. The Administrative and Leadership Teams will continue to evaluate the progress of the personalized and virtual paths offered to EACS students. Annual surveys will be shared to gain feedback and insight on the paths to help determine any necessary implementations or changes that need to be made for the upcoming school year. Parent education will remain a significant focus and an additional Parent Power-Up will be offered in the spring. The 2023-2024 proved to be a successful year with opportunities for parents to engage and learn how to best serve their students educational needs at home by attending webinars and in person trainings at the Parent Summit and first Parent Power-Up.

2) EACS will continue to offer opportunities for students to build rapport with peers while learning to enhance their social-emotional well-being through participation in lessons, conversations, and community engagement.

3) EACS will continue to assess students using i-Ready diagnostic benchmark assessments and encourage completion of personalized lessons to help strengthen skills and close learning gaps. In addition, EACS will continue to provide grade level test prep packets, virtual test prep sessions, and practice tests to help prepare students for state testing. At Excel Academy, our goal is to strive for 100% participation on all required internal and state assessments and to improve test scores by 2% each year.

4) English Learners will continue to be provided with the required English Language Development (ELD) curriculum and mandatory live instruction to help build English fluency in reading, writing, listening, and speaking. EACS' goal is to increase the number of Reclassified Fluent English Proficient (RFEP) students each year.

5) EACS will maintain and build upon our high school graduation success by focusing on supporting students so that they can achieve their goal of high school graduation through continual monitoring of student data to identify students who are struggling and provide interventions to assist students in overcoming barriers so they can be successful and stay on track to complete courses and graduate.

6) The High School Department is working to establish a more transparent A-G tracking system through our school information system for the 2024-2025 school year.

## Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Not Applicable

## Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

### ***Schools Identified***

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable to Excel Academy Charter School - Warner

### ***Support for Identified Schools***

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable to Excel Academy Charter School - Warner

### ***Monitoring and Evaluating Effectiveness***

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable to Excel Academy Charter School - Warner

# Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Administrators (Executive Director, Director of Operations, Director of Business Services, Director of Assessment and Accountability, Director of Special Education, Elementary Principal, Secondary Principal, Assistant Director of Human Resources) - Meetings	Administrators meet bi-monthly - purpose to instill effective strategic planning that aligns educational partners with a shared mission, vision, and productive decision making for students to reach their full academic and social-emotional well-being and potential Principals offer opportunities for educational partner engagement - Examples - "Meet the Principals," Coffee with the Principals Assessment results, curriculum choices, broad course of study, parent education, ADA, graduation, CA Dashboard outcomes, etc. contribute and influence the development of the LCAP
SSC, ELAC, PAC - Meetings	Request input from the advisory groups throughout the school year that influence the goals and actions within the LCAP that will improve student learner outcomes Request completion of EACS surveys from educational partners
PLC (Personal Learning Communities) Meetings	PLCs met monthly (comprised of all elementary, secondary, and intervention teachers) to plan for and support grade level and school-wide goals aligned with the LCAP and student learner outcomes Discuss potential barriers for students, prepare a plan, and implement change to meet the needs of all students Focus on communication with families regarding student strengths and learning gaps - provide strategies, resource tools, guidance, and support to enhance skills and close learning gaps

Educational Partner(s)	Process for Engagement
Governing Board	Provides insight, feedback, and approval (when necessary) on policies, procedures, state reporting, surveys, etc. to improve student learner outcomes associated with the LCAP Community/public is invited to the board meetings
Staff Meetings (ALL STAFF)	The staff meets throughout the school year to: discuss agenda items related (but not limited to) goals and actions, school safety, culture, and climate, procedures and policies, equity-based instruction, elementary, middle, and high school learning opportunities, analysis of local and state data, state reports, etc. that ultimately assists in the development of the LCAP and student learner outcomes
Educational Partner Input Surveys	Staff surveys Parent/Student surveys Feedback from educational partners influence the development of the LCAP
Department Meetings	Department leads meet bi-monthly to discuss planning, success of MTSS, student needs, attendance, student learner outcomes/support, etc.
Student Council and National Honor Society (NHS) - Meetings	Students participating in NHS meet throughout the school year Student Council is an elective course Both Student Council and NHS students focus on leadership characteristics and qualities, discuss ideas and planning for the year, volunteer opportunities, and student needs

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Excel Academy Charter School's (EACS) process for engaging educational partner feedback is based on an analysis of what knowledge was learned from the previous year and the feedback that was received. This year's process consisted of:

- 1) Held consistent administrative, staff, department lead meetings, in addition to SSC, ELAC, PAC, PLC, governing board meetings and input surveys to collaboratively monitor and support LCAP implementation, review data, discuss program updates, and identify potential adjustments to goals and actions
- 2) Updated the EACS LCAP and BOP on the website

- 3) Offered educational partner participation opportunities that consist of: Fall Parent Summit (breakout sessions for parents to meet and engage with EACS administrators and educators, and participate in parent education sessions), Spring Parent Power-Up (Spring PAC meeting, breakout sessions to build on student learning, student-centered activities for students in grades TK-12)
- 4) Offered "Coffee with the Principals" to provide school administrators with input about EACS that drives the LCAP development process
- 5) Hosted "Back to School" events across all regions to engage with students and families who are new or returning to EACS through a variety of activities and Q & A sessions
- 6) Met with NHS and Student Council, EACS' student advisory committee and leadership groups, to request feedback in order to identify student needs and actions to address needs
- 7) Held consistent staff meetings to review and analyze desegregated i-Ready, CAASPP, and Summative ELPAC data to determine the grade level needs within the domains, as well as actions to assist students who are performing below grade level expectations
- 8) Surveyed staff members, parents, and students separately to gather feedback related to student needs and the potential actions to address the identified needs
- 9) Created the SPSA and mid-year LCAP using educational partner feedback which provided insight to update the LCAP
- 10) Shared collected and analyzed assessment data with educational partners, along with the collected survey results and testimonials to keep all partners aware of the input - data included SWD, SED, and EL students
- 11) Provided consistent communication throughout the school year to inform educational partners of upcoming meetings - Communication consisted of posting on Beehively (main communication platform), emails, phone calls, weekly memos and newsletters
- 12) LCAP was presented to the ELAC on May 22, 2024 and SSC on May 23, 2024 for input

EACS' input consisted of feedback provided by educational partners that assisted in the process of finalizing the LCAP. This year's input consisted of:

- 1) Providing opportunities for all students in grades K-11 to increase their i-Ready, CAASPP, and Summative ELPAC scores with additional guided test prep sessions and completion of practice tests
- 2) Focusing on strategies to support staff, student, and parent relationships - building stronger communication skills both in-person and through all available social media platforms, offering more parent education to assist parents at home
- 3) Increasing opportunities to: a) enhance participation at SSC, ELAC, and PAC meetings by focusing on cultural awareness and opportunities to spotlight students, b) participate in community events for all students, including high school students, by creating additional in person events across all regions
- 4) Implementing professional development for staff to stay abreast of: new policies and procedures within their departments (i.e. education, SPED, assessment, operations, and business services), state expectations, assessment analysis of all student groups, grade levels, and content within the ELA and math domains, new strategies to assist all student learning that supports the overall development of academic and social-emotional learning instruction, and strengthening staff leadership skills
- 5) Expanding learning opportunities for foster youth, EL, and socio-economically disadvantaged students  
Improving ELA and math performance for all students and build English proficiency for all EL students while monitoring the progress of LTEL (Long Term English Learner) students
- 6) Providing ongoing instructional support for all students falling one plus grade levels below grade level - providing additional resources, support, live classes, and tutoring
- 7) Focusing on: maintaining high ADA, A-G offered courses, high graduation rate, expanding CTE course offerings, low chronic absenteeism, and zero suspension and expulsion rates

8) Offering additional programs for students (i.e. implementation of the GATE program (with CoGAT8 testing) and the chess club

In response to the ongoing need that the educational partners identified, the feedback influenced the decision to focus on the four goals and actions that are aligned to each goal. Each action was individually addressed and assessed to ensure it is relevant to the current goal, mission, vision, and student learner outcomes identified by the school.



# Goals and Actions

## Goal

Goal #	Description	Type of Goal
1	Excel Academy Charter School (EACS) will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.	Broad Goal

State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 7: Course Access (Conditions of Learning)

An explanation of why the LEA has developed this goal.

Broad Goal:

With a focus on supporting student achievement, the goal and our actions/services focus on monitoring each student's academic achievement. Continual monitoring of student data to identify struggling students and interventions is important to the success of our students and helps prevent learning gaps. The metrics we utilize to ensure students are on track for graduation include i-Ready, CAASPP, and ELPAC.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2023-2023 CAASPP data.  66% met or exceeded standards 20% nearly met standards 14% not met standards			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.2	CAASPP Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2022-2023 CAASPP data.  56% met or exceeded standards 25% nearly met standards 19% not met standards			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	
1.3	i-Ready ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2024 i-Ready ELA Spring Scores ALL Tier 1: 74.7% Tier 2: 15% Tier 3: 10.3%  English Learners Tier 1: 67% Tier 2: 27% Tier 3: 6%  Economically Disadvantaged Tier 1: 68% Tier 2: 20% Tier 3: 12%  Students w/ IEPs Tier 1: 47% Tier 2: 15% Tier 3: 38%			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	
1.4	i-Ready Math Increase the number of students that have met	2024 i-Ready Math Fall Scores ALL			Increase the number of students that have	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	or exceeded grade level proficiency by 2% each year.	Tier 1: 68.8% Tier 2: 19%% Tier 3: 12.3%  English Learners Tier 1: 52% Tier 2: 33% Tier 3: 15%  Economically Disadvantaged Tier 1: 63% Tier 2: 21% Tier 3: 16%  Students w/ IEPs Tier 1: 42% Tier 2: 11% Tier 3: 47%			met or exceeded grade level proficiency by 2% each year.	
1.5	Increase ELPAC levels annually	A baseline will be developed from 2023-2024 Summative ELPAC data.			Increase number of RFEP students annually based on the Summative ELPAC score reports	
1.6	State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with local indicator outcomes			Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with local indicator outcomes	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.7	State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach			100% of teachers are appropriately credentialed for the courses they teach	
1.8	State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials			0% Students lacking textbooks and other instructional materials	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Achievement	1.1 Excel Academy will increase the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in language arts and mathematics through a database system that collects individual formative and summative data. Data collection and analysis includes statewide and internal assessments as measured by the CA Dashboard and accountability systems.		No
1.2	Student Monitoring	1.2 Monitor low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments to review student learner outcomes and ensure academic success as well as social and emotional wellness, or refer to the RTI, SST, or IEP team. Offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.		Yes
1.3	Broad Course of Study	1.3. All students have access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels assisting students in completing standards-aligned content. <ul style="list-style-type: none"> <li>• Online courses, credit recovery, core programs</li> <li>• Supplemental curriculum and materials supporting Common Core Standards</li> <li>• Extended School year</li> <li>• Curriculum aligned to Common Core</li> <li>• English Language Development (ELD) curriculum</li> </ul>	\$12,533,102.00	No
1.4	Professional Development	1.4 Professional development opportunities for teachers and administrators to equip them with information and resources to better serve students and parents, for example, tools for goal setting and curriculum pacing, identifying, supporting, and monitoring students in the "What I Need" (WIN)	\$76,777.00	No

Action #	Title	Description	Total Funds	Contributing
		and English Language Development (ELD) program. Professional development through organizations such as CSSA (California Charter School Association), CSDC (Charter School Development Center) and APLUS+.		
<b>1.5</b>	Parent Training	1.5 Provide parent training, learning opportunities, and workshops on a variety of topics, for example, explaining the EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and teacher parent training.		Yes
<b>1.6</b>	Grade Level Curriculum and Instruction	1.6 Students will be provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.		No
<b>1.7</b>	Student Monitoring and Support	1.7 Identify, support, and monitor students performing one or more years below grade level through the "What I Need" (WIN) intervention program. Students are required to participate in weekly intervention programs that are monitored by the credentialed teacher. Students who are performing below grade level on the fall i-Ready assessments will have the opportunity to take the mid-year i-Ready assessment(s).	\$51,440.00	Yes
<b>1.8</b>	Needs Assessment and Data Analysis	1.8 Use data analysis and historical tracking of performance on internal and state testing to drive our policies, curriculum, and program decisions.	\$9,016.00	No

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
2	Excel Academy Charter School (EACS) will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.	Maintenance of Progress Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)

### An explanation of why the LEA has developed this goal.

#### Maintenance Goal:

We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal and actions/services are focused on student, family, and teacher engagement and connectedness to attain a high average daily attendance.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintain or decrease chronic absenteeism rate of .01%	A baseline will be developed from 2023-2024 data			Continue to maintain or decrease Chronic Absenteeism rate of .01%	
2.2	Strive for 0% expulsion rate each year	0% Expulsion Rate			Maintain 0% expulsion rate each year	



Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.3	Strive for 0% suspension rate each year	0% Suspension Rate			Maintain 0% suspension rate each year	
2.4	State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach			100% of teachers are appropriately credentialed for the courses they teach	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
2.1	School Climate and Student Engagement	2.1 Focus on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides.	\$55,369.00	No
2.2	Certificated and Classified Salaries and Benefits	2.2 Recruit and retain highly qualified multiple and single-subject teachers and classified staff, maintaining appropriate assignments and remaining competitive with salary and benefits.	\$161,886.00	No
2.3	Educational Partner Communication	2.3 Frequent communication with parents/students to notify them of school events, opportunities, and resources through Beehively, email, the school website, and social media platforms. We will build partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.	\$32,550.00	No
2.4	Technology	2.4 Purchase technological devices and provide professional development to promote student engagement and develop 21st Century skills and support access to instruction as needed.	\$62,000.00	No
2.5	Professional Development	2.5 Professional development in cultural awareness.		No

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
3	Excel Academy Charter School (EACS) will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.	

State Priorities addressed by this goal.

Priority 3: Parental Involvement (Engagement)  
 Priority 5: Pupil Engagement (Engagement)  
 Priority 6: School Climate (Engagement)

An explanation of why the LEA has developed this goal.

Maintenance Goal:

Establishing connections and partnerships in education with our students and parents correlates with students attending school more regularly, earning higher grades, and graduating from high school. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2023-2024 Maintain or increase by 2%			Maintain or increase by 2%	
3.2	State Local Indicator Priority 6:	Overall Satisfaction Report: Based on 351			Maintain or increase by 2%	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	<p>Overall Satisfaction Rate Survey Results Maintain or increase by 2% each year</p>	<p>parent/guardian responses:</p> <p>98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)</p> <p>98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)</p> <p>98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)</p> <p>99.4% of survey respondents agree that EACS clearly communicates</p>				

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)				
3.3	Safety Plan Review and Training	Annual Review/Updates and Training Dates			Consistent plan and review process	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Educational Partner Engagement	3.1 EACS will seek parent input and assess our level of educational partner engagement through parent participation in LP, ELAC, SSC, and PAC meetings, surveys, and Student Council, SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have opportunities for participation and input.		No
3.2	Educational Partner Partnerships	3.2 EACS will engage our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success.	\$419,305.00	Yes
3.3	School Climate	3.3 EACS will build relationships by ensuring that all parents, students, and teachers feel that our schools are providing a safe, positive, inclusive, and welcoming learning environment.	\$85,188.00	No
3.4	Student Services	3.4 EACS will properly vet all newly hired Content and Community Providers to ensure standards alignment and safety for our students.	\$58,656.00	No
3.5	School Climate and School Safety	3.5 EACS will continue to maintain a safe learning environment for all students by training the teachers and staff on school-wide safety plans.		No
3.6	Communication and Translation Services	3.6 EACS will provide notices, reports, statements, or records sent to a student, parent, or guardian will be translated as needed. Documents, records, and statements will be sent upon request by clerical staff.	\$0.00	Yes
3.7	School Operating Services	3.7 EACS' operations of the charter are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.		No





# Goals and Actions

## Goal

Goal #	Description	Type of Goal
4	We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all educational partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.	Broad Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

### An explanation of why the LEA has developed this goal.

#### Broad Goal:

With a focus on supporting our students to achieve their goal of high school graduation and college and career preparedness, the goal and actions/services focuses on monitoring each student's progress toward graduation. The continual monitoring of student data to identify struggling students and interventions is important to the success of our students staying on-track with course completion and on course to graduation. Graduation rate, college/career preparedness, and CTE participation are all metrics we monitor to ensure students are on track to graduate and to achieve their post-graduation goals.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.1	Graduation Rate Dropout Rate	Develop a baseline from 2020-21 data			Increase the graduation rate and decrease the dropout rate	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.2	Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU prepared			Increase the CTE participants and students who are UC/CSU prepared	
4.3	Access to a Broad Curriculum: College/Career Prepared  Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	Develop a baseline for students enrolled in and completion of A-G courses required for UC/CSU Admission			Increase number of students enrolled in A-G courses required for UC/CSU Admission	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
4.1	College and Career Readiness and Career Technical Education	4.1 Consistent with California College and Career Indicators, develop a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals; continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.	\$10,961.00	No
4.2	High School Graduation	4.2 Students transitioning from middle to high school will be monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.	\$285,697.00	No
4.3	High School Curriculum and Instruction	4.3 Provide high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.	\$846,300.00	No
4.4	Testing	4.4 Ensure all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities.	\$3,844.00	Yes
4.5	Testing	4.5 Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.		Yes
4.6	A-G and Career Technical Education Courses	4.6 Expand our A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.	\$23,211.00	No

Action #	Title	Description	Total Funds	Contributing
4.7	Needs Assessment - Data Analysis	4.7 Analyze 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Provide targeted interventions and resources to students identified as needing additional support.		No

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2024-25]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$928,056	\$0

## Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
8.365%	2.916%	\$312,580.00	11.281%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

## Required Descriptions

### LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.2	<p><b>Action:</b> Student Monitoring</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b></p>	Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments is necessary to evaluate student progress and to identify areas of strength and needs withing ELA and math domains. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	LEA-wide	academic growth, in addition to social-emotional awareness classes and character building.	
1.5	<p><b>Action:</b> Parent Training</p> <p><b>Need:</b> Parents - Home Educators</p> <p><b>Scope:</b> LEA-wide</p>	Providing parent training, learning opportunities, and workshops on a variety of topics will guide parents to provide the best educational support at home for their students.	Survey results Student academic progress and growth monitoring - assessments, learning period meeting attendance and work samples
1.7	<p><b>Action:</b> Student Monitoring and Support</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> LEA-wide</p>	Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments will provide the appropriate data to review student learner outcomes and provide students with the appropriate resources and interventions to meet grade level expectations. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students
3.2	<p><b>Action:</b> Educational Partner Partnerships</p> <p><b>Need:</b> Administrators, teachers, staff, parents, students, governing board, community/public</p> <p><b>Scope:</b> LEA-wide</p>	Engaging EACS educational partners in an intentional, meaningful, and consistent manner by monitoring student performance and providing timely interventions will help promote growth and success for students to meet their individual goals and meet or exceed grade level expectations.	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
			Growth and progress analysis from the teachers assigned to the students
3.6	<p><b>Action:</b> Communication and Translation Services</p> <p><b>Need:</b> Educational Partners - Parents, guardians, students</p> <p><b>Scope:</b> LEA-wide</p>	Ongoing communication in English and in the students' home language (upon request) keeps an open line of communication to better support individual student needs and keeps educational partners aware of policies, procedures, events, important notices, etc. that guide student learning.	Survey responses Teacher feedback Department lead feedback Attendance at school events
4.4	<p><b>Action:</b> Testing</p> <p><b>Need:</b> All students including low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> LEA-wide</p>	Ensuring that all students have the opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities, sets students up for success on the state assessments. CAASPP preparation includes oversight from assigned teacher to make sure the students are paced properly with their ELA and math curriculum, have intervention support if needed, tutoring support if needed, access to test prep packets, live test prep sessions with EACS teachers, and state practice tests.	Director of Assessment and Accountability Feedback Intervention Department Feedback Teacher Feedback CAASPP test scores
4.5	<p><b>Action:</b> Testing</p> <p><b>Need:</b> Low-income pupils and foster youth</p> <p><b>Scope:</b> LEA-wide</p>	Providing advanced placement exam costs for low-income and foster youth who are experiencing financial hardship provides students with the necessary support to complete exams.	Admission Team and High School Principal Feedback



### Limited Actions

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
1.2	<p><b>Action:</b> Student Monitoring</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> Limited to Unduplicated Student Group(s)</p>	<p>Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments is necessary to evaluate student progress and to identify areas of strength and needs withing ELA and math domains. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.</p>	<p>i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students</p>

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Services for our low-income, English Learners, and foster youth are targeted interventions that were identified through a collaborative effort with the school's Executive Director, Director of Assessment and Accountability, Assistant Director of Intervention, High School Principal, and High School Counselors. The goals and actions in the LCAP are focused on increasing services and improving the quality of the academic support to improve student performance, educational partner engagement, and the level of college and career readiness of our student groups. Through a collaborative effort, the school leadership team, taking into account the feedback provided from all educational partners, identified the next steps to growth towards each of our goals. We expect to see improvement in student engagement and achievement as reflected in i-Ready and CAASPP test scores, and an increase in our graduation and college and career readiness rate.

**Additional Concentration Grant Funding**

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

<b>Staff-to-student ratios by type of school and concentration of unduplicated students</b>	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	N/A	N/A
Staff-to-student ratio of certificated staff providing direct services to students	N/A	N/A

# 2024-25 Total Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	11,094,651	928,056	8.365%	2.916%	11.281%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$12,022,707.00	\$2,228,342.00	\$124,000.00	\$340,253.00	\$14,715,302.00	\$9,218,943.00	\$5,496,359.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Achievement	All	No				2022-2025							
1	1.2	Student Monitoring	English Foster Low Learners Youth Income	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	2022-2025							
1	1.3	Broad Course of Study	All	No				2022-2025	\$8,200,014.00	\$4,333,088.00	\$10,147,281.00	\$2,084,825.00	\$124,000.00	\$176,996.00	\$12,533,102.00
1	1.4	Professional Development	All	No			All Schools	2022-2025	\$0.00	\$76,777.00	\$0.00	\$49,290.00	\$0.00	\$27,487.00	\$76,777.00
1	1.5	Parent Training	English Learners	Yes	LEA-wide	English Learners	All Schools	2022-2025							
1	1.6	Grade Level Curriculum and Instruction	All	No				2022-2025							
1	1.7	Student Monitoring and Support	English Foster Low Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-2025	\$0.00	\$51,440.00				\$51,440.00	\$51,440.00
1	1.8	Needs Assessment and Data Analysis	All	No				2022-2025	\$0.00	\$9,016.00		\$9,016.00			\$9,016.00
2	2.1	School Climate and Student Engagement	All	No				2022-2025	\$55,369.00	\$0.00	\$55,369.00				\$55,369.00
2	2.2	Certificated and Classified Salaries and Benefits	All	No				2022-2025	\$161,886.00	\$0.00	\$161,886.00				\$161,886.00

Goal #	Action #	Action Title	Student Group(s)		Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
2	2.3	Educational Partner Communication	All		No				2022-2025	\$0.00	\$32,550.00	\$32,550.00				\$32,550.00
2	2.4	Technology	All		No				2022-2025	\$0.00	\$62,000.00		\$62,000.00			\$62,000.00
2	2.5	Professional Development	All		No				2021-2024							
3	3.1	Educational Partner Engagement	All		No				2022-2025							
3	3.2	Educational Partner Partnerships	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-2025	\$419,305.00	\$0.00	\$334,975.00			\$84,330.00	\$419,305.00
3	3.3	School Climate	All		No				2022-2025	\$0.00	\$85,188.00	\$85,188.00				\$85,188.00
3	3.4	Student Services	All		No				2022-2025	\$58,656.00	\$0.00	\$58,656.00				\$58,656.00
3	3.5	School Climate and School Safety	All		No				2022-2025							
3	3.6	Communication and Translation Services	English	Learners	Yes	LEA-wide	English Learners	All Schools	2022-2025	\$0.00	\$0.00	\$0.00				\$0.00
3	3.7	School Operating Services	All		No				2022-2025							
4	4.1	College and Career Readiness and Career Technical Education	All		No				2022-2025	\$10,961.00	\$0.00	\$10,961.00				\$10,961.00
4	4.2	High School Graduation	All		No				2022-2025	\$285,697.00	\$0.00	\$285,697.00				\$285,697.00
4	4.3	High School Curriculum and Instruction	All		No				2022-2025	\$0.00	\$846,300.00	\$846,300.00				\$846,300.00
4	4.4	Testing	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-2025	\$3,844.00	\$0.00	\$3,844.00				\$3,844.00
4	4.5	Testing	Foster Low	Youth Income	Yes	LEA-wide	Foster Youth Low Income	All Schools	2022-2025							
4	4.6	A-G and Career Technical Education Courses	All		No				2022-2025	\$23,211.00	\$0.00		\$23,211.00			\$23,211.00
4	4.7	Needs Assessment - Data Analysis	All		No				2022-2025							

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds

# 2024-25 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
11,094,651	928,056	8.365%	2.916%	11.281%	\$338,819.00	0.000%	3.054 %	<b>Total:</b>	\$338,819.00
								<b>LEA-wide Total:</b>	\$338,819.00
								<b>Limited Total:</b>	\$0.00
								<b>Schoolwide Total:</b>	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.2	Student Monitoring	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		
1	1.4	Professional Development				All Schools	\$0.00	
1	1.5	Parent Training	Yes	LEA-wide	English Learners	All Schools		
1	1.7	Student Monitoring and Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
3	3.2	Educational Partner Partnerships	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$334,975.00	
3	3.6	Communication and Translation Services	Yes	LEA-wide	English Learners	All Schools	\$0.00	
4	4.4	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$3,844.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
4	4.5	Testing	Yes	LEA-wide	Foster Youth Low Income	All Schools		



# 2023-24 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
<b>Totals</b>	\$13,964,360.00	\$13,472,108.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Student Achievement	No		
1	1.2	Student Monitoring	Yes		
1	1.3	Broad Course of Study	No	\$11,849,528.00	\$11,532,204
1	1.4	Professional Development	No	\$96,360.00	\$82,959.00
1	1.5	Parent Training	Yes		
1	1.6	Grade Level Curriculum and Instruction	No		
1	1.7	Student Monitoring and Support	Yes	\$60,910.00	\$27,174.00
1	1.8	Needs Assessment and Data Analysis	No	\$9,600.00	\$9,600.00
2	2.1	School Climate and Student Engagement	No	\$52,202.00	\$41,734.00
2	2.2	Certificated and Classified Salaries and Benefits	No	\$161,382.00	\$154,284.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.3	Educational Partner Communication	No	\$24,241.00	\$24,241.00
2	2.4	Technology	No	\$132,000.00	\$92,611
2	2.5	Professional Development	No		
3	3.1	Educational Partner Engagement	No		
3	3.2	Educational Partner Partnerships	Yes	\$414,540.00	\$348,242.00
3	3.3	School Climate	No	\$65,748.00	\$63,000.00
3	3.4	Student Services	No	\$61,286.00	\$61,286.00
3	3.5	School Climate and School Safety	No		
3	3.6	Communication and Translation Services	Yes	\$6,308.00	\$6,308.00
3	3.7	School Operating Services	No		
4	4.1	College and Career Readiness and Career Technical Education	No	\$16,000.00	\$6,500.00
4	4.2	High School Graduation	No	\$208,431.00	\$266,615.00
4	4.3	High School Curriculum and Instruction	No	\$625,124.00	\$610,050.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	4.4	Testing	Yes	\$148,970.00	\$145,300.00
4	4.5	Testing	Yes		
4	4.6	A-G and Career Technical Education Courses	No	\$31,730.00	\$0
4	4.7	Needs Assessment - Data Analysis	No		

# 2023-24 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$812,430.00	\$569,818.00	\$499,850.00	\$69,968.00	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
startcol	lapse						
1	1.2	Student Monitoring	Yes				
1	1.5	Parent Training	Yes				
1	1.7	Student Monitoring and Support	Yes				
3	3.2	Educational Partner Partnerships	Yes	\$414,540.00	\$348,242.00		
3	3.6	Communication and Translation Services	Yes	\$6,308.00	\$6,308.00		
4	4.4	Testing	Yes	\$148,970.00	\$145,300.00		
4	4.5	Testing	Yes				

To Add a Row: Click "Add Row."

To Delete a Row: Remove all content from each cell, checkbox and dropdown of a row (including spaces), press "Save Data" and refresh the page.

# 2023-24 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$10,719,774	\$812,430.00	0	7.579%	\$499,850.00	0.000%	4.663%	\$312,580.00	2.916%

# Local Control and Accountability Plan Instructions

## [Plan Summary](#)

## [Engaging Educational Partners](#)

## [Goals and Actions](#)

## [Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [LCFF@cde.ca.gov](mailto:LCFF@cde.ca.gov).

## Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
  - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
    - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (*EC* sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.



# Plan Summary

## Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

## Requirements and Instructions

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

### Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

### Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

### **Comprehensive Support and Improvement**

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

#### Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

#### Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

#### Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## **Engaging Educational Partners**

### **Purpose**

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

### **Requirements**

**School districts and COEs:** *EC* sections [52060\(g\) \(California Legislative Information\)](#) and [52066\(g\) \(California Legislative Information\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

**Charter schools:** *EC* Section [47606.5\(d\) \(California Legislative Information\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062 \(California Legislative Information\)](#);
  - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).

- For COEs, see [Education Code Section 52068 \(California Legislative Information\)](#); and
- For charter schools, see [Education Code Section 47606.5 \(California Legislative Information\)](#).
- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

## Instructions

### Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

### Complete the table as follows:

#### Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

#### Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is not necessarily limited to:
  - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
  - Inclusion of metrics other than the statutorily required metrics
  - Determination of the target outcome on one or more metrics
  - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
  - Inclusion of action(s) or a group of actions
  - Elimination of action(s) or group of actions
  - Changes to the level of proposed expenditures for one or more actions
  - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
  - Analysis of effectiveness of the specific actions to achieve the goal
  - Analysis of material differences in expenditures
  - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
  - Analysis of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

### Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
  - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

### Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

#### Focus Goal(s)

##### Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

##### Type of Goal

Identify the type of goal being implemented as a Focus Goal.

##### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

##### An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

### Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

#### Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
- (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
  - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
  - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

#### Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

#### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

#### An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.



- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
  - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

**Note:** EC Section [42238.024\(b\)\(1\) \(California Legislative Information\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

## Broad Goal

### Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.
- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

### Type of Goal

Identify the type of goal being implemented as a Broad Goal.

### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

### **Maintenance of Progress Goal**

#### Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

#### Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

#### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

### **Measuring and Reporting Results:**

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.
- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
  - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
  - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
  - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

Complete the table as follows:

Metric #
<ul style="list-style-type: none"> <li>● Enter the metric number.</li> </ul>
Metric
<ul style="list-style-type: none"> <li>● Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.</li> </ul>
Baseline
<ul style="list-style-type: none"> <li>● Enter the baseline when completing the LCAP for 2024–25.                             <ul style="list-style-type: none"> <li>○ Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).</li> <li>○ Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.</li> <li>○ Indicate the school year to which the baseline data applies.</li> <li>○ The baseline data must remain unchanged throughout the three-year LCAP.                                     <ul style="list-style-type: none"> <li>▪ This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain</li> </ul> </li> </ul> </li> </ul>

accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.

- If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
- Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

## Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
  - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

## Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.
  - Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

## Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
  - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

## Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
  - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the **Measuring and Reporting Results** part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2025–26</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2026–27</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2025–26</b> and <b>2026–27</b> . Leave blank until then.

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

**Note:** When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
  - Include a discussion of relevant challenges and successes experienced with the implementation process.
  - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

## A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
  - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
  - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
  - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

## A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
  - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:
    - The reasons for the ineffectiveness, and
    - How changes to the action will result in a new or strengthened approach.

### **Actions:**

Complete the table as follows. Add additional rows as necessary.

#### Action #

- Enter the action number.

#### Title

- Provide a short title for the action. This title will also appear in the action tables.

#### Description

- Provide a brief description of the action.

- For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
- As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
- These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

## Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

## Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
  - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496 in the Increased or Improved Services section of the LCAP.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

## Required Actions

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
  - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
  - Professional development for teachers.
  - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.
- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.



- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
  - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
  - These required actions will be effective for the three-year LCAP cycle.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA’s description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

### Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC* Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

## LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

### For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

## Requirements and Instructions

Complete the tables as follows:

### Total Projected LCFF Supplemental and/or Concentration Grants

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

### Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

### Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

### LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

**LCFF Carryover — Dollar**

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

**Total Percentage to Increase or Improve Services for the Coming School Year**

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA’s percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

**Required Descriptions:**

**LEA-wide and Schoolwide Actions**

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

**Identified Need(s)**

Provide an explanation of the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

**How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis**

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.

- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

### **Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

**Note for COEs and Charter Schools:** In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

### **Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

### **Identified Need(s)**

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

### **How the Action(s) are Designed to Address Need(s)**

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

### **Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

### **Additional Concentration Grant Funding**

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.
- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
  - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

- The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
  - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
  - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

## Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

## Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8).



Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See EC sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***
- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action is included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.



- **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
- **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate “All Schools.” If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter “Specific Schools” or “Specific Grade Spans.” Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year,” or “2 Years,” or “6 Months.”
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.
- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
  - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
  - **Note:** Equity Multiplier funds must be included in the “Other State Funds” category, not in the “LCFF Funds” category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA’s LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as

a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.

- As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

## Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

## Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

## Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
  - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

### Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
  - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**

- This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

### **Contributing Actions Annual Update Table**

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**
  - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
  - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
  - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

### **LCFF Carryover Table**

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**

- This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.

- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**

- This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).

- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education  
November 2023



## Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Helendale	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

## Plan Summary [2024-25]

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Excel Academy Charter School (EACS) is a non-classroom based California charter school offering a tuition-free personalized learning independent study model for students in grades TK-12 . Our high-quality, educational program is rooted in flexible learning, personalized schedules, and proven systems of support where credentialed teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student. The three academic path options, Personalized Elementary Path, Personalized Secondary Path, and Virtual Path, allow families to choose the mode of education that best works for the needs of the individual student and parent. For students on the Personalized Elementary and Secondary Paths, students build a customized learning plan based on individual educational goals with the support of their assigned highly-qualified credentialed teacher. In collaboration with the credentialed Teacher of Record (ToR), parents select from a variety of educational resources, services, and materials. Using these educational resources, families build a customized learning experience for their students, tailored to fit their academic, emotional, and social needs. Students on the personalized paths meet face to face and via a variety of platforms throughout the monthly learning periods to ensure students' unique needs are met, and the students are showing academic growth and progress through grade level and state standards. Teachers, students, and parents consistently collaborate to properly pace and design an instructional schedule to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. On the Virtual Path, students in grades 1-8 benefit from a structured virtual classroom environment overseen by a credentialed teacher. Quality grade-level curriculum is used by the teacher to provide direct, daily instruction to students, as well as to assign independent learning activities. Parents/guardians partner with teachers to ensure students complete all assigned learning activities. Every student enrolled in Excel Academy benefits from the expertise, guidance, and oversight of a credentialed teacher who develops a personal learning plan and pacing guides for each subject for their students. Daily and

weekly communication occurs between teachers, parents, and students to ensure academic progress as well as support social and emotional success. Excel Academy operates on a traditional school calendar with regularly scheduled holidays. EACS is accredited by the Western Association of Schools and Colleges (WASC) which is a statement to the community and educational partners that the institution is reputable, student-oriented, focused on quality education and student performance, and committed to ongoing improvement. EACS believes in fostering strong educational partnerships between the school, parents, students, and stakeholders through continued communication, collaboration, and transparency.

Students enrolled in this school reside in urban, suburban, and rural areas throughout San Bernardino, Los Angeles, Kern, and Inyo counties. Excel Academy serves a diverse community of students and parents due to the nature of independent study. According to the California Department of Education's DataQuest, in 2023-2024 Excel Academy Charter School - Helendale reported an enrollment of 602 students. This includes the enrollment of 49% socio-economically disadvantaged, 4.4% English Learners, 12% Special Education, .6% Homeless, and .3% Foster Youth. 45.2% of students enrolled in Excel Academy Charter School- Helendale are Hispanic.

#### Mission Statement:

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

#### Our Vision:

We are all about CHOICE:

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

## Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

### Excel Academy Charter School's (EACS) Annual Performance Reflections

#### 1) Local and State Assessment Results



As a California Distinguished School, Excel Academy continues to focus on closing the achievement gap and obtaining exceptional student performance by providing equity-based instruction and a broad course of study. The i-Ready diagnostic benchmark assessments, EACS' local assessment, were administered to measure student progress in the fall, winter, and spring during the 2023-2024 school year. Based on an analysis of our i-Ready fall and spring scores in ELA and Math, EACS demonstrated success in decreasing the percentages of students in tiers 2 & 3 (one or more grade levels below the current grade level). 72.2% of our students are at or above grade level in ELA. Tier 1 (students at or above grade level) grew over 12% since the first diagnostic in September. 63.1% of EACS students are at or above grade level in math. Tier 1 (students at or above grade level) grew by 18% since the first diagnostic in September. Excel Academy attributes the progress and success to the consistent support and guidance of our credentialed teachers, communication between teachers, students, and parents, the consistent completion of the i-Ready personalized lessons, and the interventions in place to provide specific resources, supplements, and live instruction to close learning gaps and strengthen skills.

25% of students in the WIN Intervention Program reached proficiency in the spring in math and reading.

63% of students in the math, ELA, and ELD intervention classes grew by one grade level or more from fall to spring

73% of the EACS identified homeless and foster youth populations, served through general education, are proficient in math and ELA based on the spring i-Ready benchmark assessment data.

The 2022-2023 CAASPP data showed that EACS' participation rate exceeded state requirements, and EACS students continue to exceed county and state percentages in ELA and math.

60% of students met or exceeded standards in ELA. There is a 1% increase from the 2021-2022 test scores.

48% of students met or exceeded standards in math. The percentage remained the same from the 2021-2022 test scores.

In comparison to 59 charter schools with similar demographics and enrollment, EACS ranked 7th overall in ELA and 4th overall in math.

We attribute the progress and success our students are showing on the state assessments to the consistent communication and collaboration between the staff with the teachers, teachers with the parents and students, and the implementation of interventions and resources that specifically meet the individual needs of each student. Our students are assessed throughout the year, so teachers can make adjustments to their students' plan of instruction. Students are also provided with test prep packets and virtual sessions to help prepare them for the assessments.

2) EACS believes in fostering strong educational partnerships between the school, parents, students, and all educational partners through continued communication, collaboration, and transparency. EACS values educational partner input to reflect on the school's overall progress, successes, continuous improvement, and to identify and establish the next steps to drive instruction, school-wide goals, and student learner outcomes. Building strong connections with students and parents leads to increased student engagement, learning, and achievement. The dedication of the EACS staff has ensured consistent and valued communication between all educational partners. The number one priority of EACS is the success of all students academically, socially, and emotionally. Through our systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the input survey results, parents and students agree that EACS is dedicated to providing an education that denotes excellence.

Overall Satisfaction Report: Based on 351 parent/guardian responses:

98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)

98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)

98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)

99.4% of survey respondents agree that EACS clearly communicates academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)

Overall Satisfaction Report: Based on 123 student responses (grades 6-12)

96.7% of survey respondents agree that their teacher cares about their education and is committed to helping them succeed.

95.1% of survey respondents agree that the curriculum provides challenging grade level instruction and assessments of their academic progress, and students feel safe and welcome to discuss their progress with their teachers.

95.1% of survey respondents agree that EACS does a great job communicating with students.

Meaning: Overall high satisfaction rate with the school program.

Use: EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and by providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback and analyze the areas that can be maintained and improved upon.

3) Excel Academy offered a plethora of opportunities to build student engagement and peer connections through monthly Outdoor Classroom days where students collaborated on hands-on experiments tied to content standards, virtual learning lessons across all core subjects, and field trips throughout Southern California. In addition, students had access to: Social Emotional Learning Lessons led by credentialed teachers to connect with peers and to learn important life skills, Care Solace surveys to better support mental health, theater productions, Coder-Z, eSports, chess club, and Student Council programs. The GATE (Gifted and Talented Education) Program is thriving with students in grades 3-8 participating in engaging, project-based STEM activities throughout the school year. EACS offered GATE testing using the CogAT8 assessments.

4) EACS students in the "What I Need" WIN intervention program showed tremendous growth in six months after retaking the i-Ready assessments. Additional classes were implemented to serve students who need to focus on early reading and foundational math.

5) English Learners were provided with grade level appropriate weekly live instruction at the appropriate grade level in reading, writing, listening, and speaking to build English language fluency. 39% of students in English Language Development (ELD) classes grew by one or

more grade levels in six months based on spring i-Ready results. The students enjoyed the sessions and we are looking forward to seeing the progress they have made on the Summative ELPAC assessment.

7) Excel Academy's 0% suspension and expulsion rates and low chronic absenteeism rate of 0.8% is a success that the school takes great pride in.

8) In addition to continuing to increase the school's A-G course offerings, Excel Academy continued to focus on increasing access to A-G courses with an emphasis on our 9th and 10th grade students. With great success, all core A-G required coursework is accessible for A-G completion. EACS introduced additional support for struggling students to meet Algebra 1 requirements and students are on track to complete the next math sequence.

EACS will continue to build educational partner engagement and CA Dashboard data success by:

1) EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback, and analyze the areas that we can maintain and improve upon. The Administrative and Leadership Teams will continue to evaluate the progress of the personalized and virtual paths offered to EACS students. Annual surveys will be shared to gain feedback and insight on the paths to help determine any necessary implementations or changes that need to be made for the upcoming school year. Parent education will remain a significant focus and an additional Parent Power-Up will be offered in the spring. The 2023-2024 proved to be a successful year with opportunities for parents to engage and learn how to best serve their students educational needs at home by attending webinars and in person trainings at the Parent Summit and first Parent Power-Up.

2) EACS will continue to offer opportunities for students to build rapport with peers while learning to enhance their social-emotional well-being through participation in lessons, conversations, and community engagement.

3) EACS will continue to assess students using i-Ready diagnostic benchmark assessments and encourage completion of personalized lessons to help strengthen skills and close learning gaps. In addition, EACS will continue to provide grade level test prep packets, virtual test prep sessions, and practice tests to help prepare students for state testing. At Excel Academy, our goal is to strive for 100% participation on all required internal and state assessments and to improve test scores by 2% each year.

4) English Learners will continue to be provided with the required English Language Development (ELD) curriculum and mandatory live instruction to help build English fluency in reading, writing, listening, and speaking. EACS' goal is to increase the number of Reclassified Fluent English Proficient (RFEP) students each year.

5) EACS will maintain and build upon our high school graduation success by focusing on supporting students so that they can achieve their goal of high school graduation through continual monitoring of student data to identify students who are struggling and provide interventions to assist students in overcoming barriers so they can be successful and stay on track to complete courses and graduate.

6) The High School Department is working to establish a more transparent A-G tracking system through our school information system for the 2024-2025 school year.

## Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Not Applicable

## Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

### ***Schools Identified***

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable to Excel Academy Charter School – Helendale

### ***Support for Identified Schools***

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable to Excel Academy Charter School – Helendale

### ***Monitoring and Evaluating Effectiveness***

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable to Excel Academy Charter School – Helendale

# Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Administrators (Executive Director, Director of Operations, Director of Business Services, Director of Assessment and Accountability, Director of Special Education, Elementary Principal, Secondary Principal, Assistant Director of Human Resources) - Meetings	Administrators meet bi-monthly - purpose to instill effective strategic planning that aligns educational partners with a shared mission, vision, and productive decision making for students to reach their full academic and social-emotional well-being and potential Principals offer opportunities for educational partner engagement - Examples - "Meet the Principals," Coffee with the Principals Assessment results, curriculum choices, broad course of study, parent education, ADA, graduation, CA Dashboard outcomes, etc. contribute and influence the development of the LCAP
SSC, ELAC, PAC - Meetings	Request input from the advisory groups throughout the school year that influence the goals and actions within the LCAP that will improve student learner outcomes Request completion of EACS surveys from educational partners
PLC (Personal Learning Communities) Meetings	PLCs met monthly (comprised of all elementary, secondary, and intervention teachers) to plan for and support grade level and school-wide goals aligned with the LCAP and student learner outcomes Discuss potential barriers for students, prepare a plan, and implement change to meet the needs of all students Focus on communication with families regarding student strengths and learning gaps - provide strategies, resource tools, guidance, and support to enhance skills and close learning gaps

Educational Partner(s)	Process for Engagement
Governing Board	Provides insight, feedback, and approval (when necessary) on policies, procedures, state reporting, surveys, etc. to improve student learner outcomes associated with the LCAP Community/public is invited to the board meetings
Staff Meetings (ALL STAFF)	The staff meets throughout the school year to: discuss agenda items related (but not limited to) goals and actions, school safety, culture, and climate, procedures and policies, equity-based instruction, elementary, middle, and high school learning opportunities, analysis of local and state data, state reports, etc. that ultimately assists in the development of the LCAP and student learner outcomes.
Educational Partner Input Surveys	Staff surveys Parent/Student surveys Feedback from educational partners influence the development of the LCAP
Department Meetings	Department leads meet bi-monthly to discuss planning, success of MTSS, student needs, attendance, student learner outcomes/support, etc.
Student Council and National Honor Society (NHS) - Meetings	Students participating in NHS meet throughout the school year Student Council is an elective course Both Student Council and NHS students focus on leadership characteristics and qualities, discuss ideas and planning for the year, volunteer opportunities, and student needs

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Excel Academy Charter School's (EACS) process for engaging educational partner feedback is based on an analysis of what knowledge was learned from the previous year and the feedback that was received. This year's process consisted of:

- 1) Held consistent administrative, staff, department lead meetings, in addition to SSC, ELAC, PAC, PLC, governing board meetings and input surveys to collaboratively monitor and support LCAP implementation, review data, discuss program updates, and identify potential adjustments to goals and actions
- 2) Updated the EACS LCAP and BOP on the website



- 3) Offered educational partner participation opportunities that consist of: Fall Parent Summit (breakout sessions for parents to meet and engage with EACS administrators and educators, and participate in parent education sessions), Spring Parent Power-Up (Spring PAC meeting, breakout sessions to build on student learning, student-centered activities for students in grades TK-12)
- 4) Offered "Coffee with the Principals" to provide school administrators with input about EACS that drives the LCAP development process
- 5) Hosted "Back to School" events across all regions to engage with students and families who are new or returning to EACS through a variety of activities and Q & A sessions
- 6) Met with NHS and Student Council, EACS' student advisory committee and leadership groups, to request feedback in order to identify student needs and actions to address needs
- 7) Held consistent staff meetings to review and analyze desegregated i-Ready, CAASPP, and Summative ELPAC data to determine the grade level needs within the domains, as well as actions to assist students who are performing below grade level expectations
- 8) Surveyed staff members, parents, and students separately to gather feedback related to student needs and the potential actions to address the identified needs
- 9) Created the SPSA and mid-year LCAP using educational partner feedback which provided insight to update the LCAP
- 10) Shared collected and analyzed assessment data with educational partners, along with the collected survey results and testimonials to keep all partners aware of the input - data included SWD, SED, and EL students
- 11) Provided consistent communication throughout the school year to inform educational partners of upcoming meetings - Communication consisted of posting on Beehively (main communication platform), emails, phone calls, weekly memos and newsletters
- 12) LCAP was presented to the ELAC on May 22, 2024 and SSC on May 23, 2024 for input

EACS' input consisted of feedback provided by educational partners that assisted in the process of finalizing the LCAP. This year's input consisted of:

- 1) Providing opportunities for all students in grades K-11 to increase their i-Ready, CAASPP, and Summative ELPAC scores with additional guided test prep sessions and completion of practice tests
- 2) Focusing on strategies to support staff, student, and parent relationships - building stronger communication skills both in-person and through all available social media platforms, offering more parent education to assist parents at home
- 3) Increasing opportunities to: a) enhance participation at SSC, ELAC, and PAC meetings by focusing on cultural awareness and opportunities to spotlight students, b) participate in community events for all students, including high school students, by creating additional in person events across all regions
- 4) Implementing professional development for staff to stay abreast of: new policies and procedures within their departments (i.e. education, SPED, assessment, operations, and business services), state expectations, assessment analysis of all student groups, grade levels, and content within the ELA and math domains, new strategies to assist all student learning that supports the overall development of academic and social-emotional learning instruction, and strengthening staff leadership skills
- 5) Expanding learning opportunities for foster youth, EL, and socio-economically disadvantaged students  
Improving ELA and math performance for all students and build English proficiency for all EL students while monitoring the progress of LTEL (Long Term English Learner) students
- 6) Providing ongoing instructional support for all students falling one plus grade levels below grade level - providing additional resources, support, live classes, and tutoring
- 7) Focusing on: maintaining high ADA, A-G offered courses, high graduation rate, expanding CTE course offerings, low chronic absenteeism, and zero suspension and expulsion rates



8) Offering additional programs for students (i.e. implementation of the GATE program (with CoGAT8 testing) and the chess club

In response to the ongoing need that the educational partners identified, the feedback influenced the decision to focus on the four goals and actions that are aligned to each goal. Each action was individually addressed and assessed to ensure it is relevant to the current goal, mission, vision, and student learner outcomes identified by the school.

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
1	Excel Academy Charter School (EACS) will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.	Broad Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 7: Course Access (Conditions of Learning)

### An explanation of why the LEA has developed this goal.

#### Broad Goal:

With a focus on supporting student achievement, the goal and our actions/services focus on monitoring each student's academic achievement. Continual monitoring of student data to identify struggling students and interventions is important to the success of our students and helps prevent learning gaps. The metrics we utilize to ensure students are on track for graduation include i-Ready, CAASPP, and ELPAC.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2023-2023 CAASPP data.  60% met or exceeded standards 22% nearly met standards 18% not met standards			Increase the number of students that have met or exceeded grade level proficiency by 2% each year, and continue to surpass both state	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
					and county test score percentages.	
1.2	CAASPP Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2022-2023 CAASPP data.  48% met or exceeded standards 28% nearly met standards 24% not met standards			Increase the number of students that have met or exceeded grade level proficiency by 2% each year, and continue to surpass both state and county test score percentages.	
1.3	i-Ready ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2024 i-Ready ELA Spring Scores ALL Tier 1: 72.2% Tier 2: 14.8% Tier 3: 13%  English Learners Tier 1: 50% Tier 2: 15% Tier 3: 35%  Economically Disadvantaged Tier 1: 66% Tier 2: 15% Tier 3: 19%  Students with IEPs Tier 1: 32% Tier 2: 19% Tier 3: 49%			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.4	i-Ready Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2024 i-Ready Math Spring Scores ALL Tier 1: 63.1% Tier 2: 22.5% Tier 3: 14.3%  English Learners Tier 1: 43% Tier 2: 33% Tier 3: 24%  Economically Disadvantaged Tier 1: 58% Tier 2: 24% Tier 3: 19%  Students with IEPs Tier 1: 31% Tier 2: 20% Tier 3: 49%			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	
1.5	Increase ELPAC levels annually	A baseline will be developed from 2023-2024 Summative ELPAC data.			Increase number of RFEP students annually based on the Summative ELPAC score reports	
1.6	State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with local indicator outcomes			Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
					developed with local indicator outcomes	
1.7	State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach			100% of teachers are appropriately credentialed for the courses they teach	
1.8	State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials			0% Students lacking textbooks and other instructional materials	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Achievement	1.1 Excel Academy will increase the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in language arts and mathematics through a database system that collects individual formative and summative data. Data collection and analysis includes statewide and internal assessments as measured by the CA Dashboard and accountability systems.		No
1.2	Student Monitoring	1.2 Monitor low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments to review student learner outcomes and ensure academic success as well as social and emotional wellness, or refer to the RTI, SST, or IEP team. Offer programs like the "What I Need" WIN intervention program to provide instruction and resources n to promote academic growth, in addition to social-emotional awareness classes and character building.		Yes
1.3	Broad Course of Study	1.3 All students have access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels assisting students in completing standards-aligned content. (All Students) <ul style="list-style-type: none"> <li>• Online courses, credit recovery, core programs</li> <li>• Supplemental curriculum and materials supporting Common Core Standards</li> <li>• Extended School year</li> <li>• Curriculum aligned to Common Core</li> <li>• English Language Development (ELD) curriculum</li> </ul>	\$7,851,115.00	No

Action #	Title	Description	Total Funds	Contributing
1.4	Professional Development	1.4 Professional development opportunities for teachers and administrators to equip them with information and resources to better serve students and parents, for example, tools for goal setting and curriculum pacing, identifying, supporting, and monitoring students in the "What I Need" (WIN) and English Language Development (ELD) program. Professional development through organizations such as CSSA (California Charter School Association), CSDC (Charter School Development Center) and APLUS+.	\$50,831.00	No
1.5	Parent Training	1.5 Provide parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and teacher parent training.		Yes
1.6	Grade Level Curriculum and Instruction	1.6 Students will be provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.		No
1.7	Student Monitoring and Support	1.7 Identify, support, and monitor students performing one or more years below grade level through the "What I Need" (WIN) intervention program. Students are required to participate in weekly intervention programs that are monitored by the credentialed teacher. Students who are performing below grade level on the fall i-Ready assessments will have the opportunity to take the mid-year i-Ready assessment(s).	\$18,064.00	Yes
1.8	Needs Assessment - Data Analysis	1.8 Use data analysis and historical tracking of performance on internal and state testing to drive our policies, curriculum, and program decisions.	\$5,526.00	No



# Goals and Actions

## Goal

Goal #	Description	Type of Goal
2	Excel Academy Charter School (EACS) will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.	Maintenance of Progress Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)

### An explanation of why the LEA has developed this goal.

#### Maintenance Goal:

We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal and actions/services are focused on student, family, and teacher engagement and connectedness to attain a high average daily attendance.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintain or decrease chronic absenteeism rate of .01%	A baseline will be developed from 2023-2024 data			Continue to maintain or decrease Chronic Absenteeism rate of .01%	
2.2	Strive for 0% expulsion rate each year	0% Expulsion Rate			Maintain 0% expulsion rate each year	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.3	Strive for 0% suspension rate each year	0% Suspension Rate			Maintain 0% suspension rate each year	
2.4	State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach			100% of teachers are appropriately credentialed for the courses they teach	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
2.1	School Climate and Student Engagement	2.1 Focus on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides.	\$33,936.00	No
2.2	Certificated and Classified Salaries and Benefits	2.2 Recruit and retain highly qualified multiple and single-subject teachers and classified staff, maintaining appropriate assignments and remaining competitive with salary and benefits.	\$99,220.00	No
2.3	Educational Partner Communication	2.3 Frequent communication with parents/students to notify them of school events, opportunities, and resources through Beehively, email, the school website, and social media platforms. We will build partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.	\$19,950.00	No
2.4	Technology	2.4 Purchase technological devices and provide professional development to promote student engagement and develop 21st Century skills and support access to instruction as needed.	\$38,000.00	No
2.5	Professional Development	2.5 Professional development in cultural awareness.		No

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
3	Excel Academy Charter School (EACS) will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.	Maintenance of Progress Goal

State Priorities addressed by this goal.

- Priority 3: Parental Involvement (Engagement)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)

An explanation of why the LEA has developed this goal.

Maintenance Goal:  
 Establishing connections and partnerships in education with our students and parents correlates with students attending school more regularly, earning higher grades, and graduating from high school. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2023-2024 Maintain or increase by 2%			Maintain or increase by 2%	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.2	<p>State Local Indicator Priority 6: Overall Satisfaction Rate Survey Results</p> <p>Maintain or increase by 2% each year</p>	<p>Overall Satisfaction Report: Based on 351 parent/guardian responses:</p> <p>98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)</p> <p>98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)</p> <p>98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)</p> <p>99.4% of survey respondents agree that</p>			<p>Maintain or increase by 2%</p>	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		EACS clearly communicates academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)				
3.3	Safety Plan Review and Training	Annual Review/Updates and Training Dates			Consistent plan and review process	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Educational Partner Engagement	3.1 EACS will seek parent input and assess our level of educational partner engagement through parent participation in LP, ELAC, SSC, and PAC meetings, surveys, and Student Council, SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have opportunities for participation and input.		No
3.2	Educational Partner Partnerships	3.2 EACS will engage our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success.	\$253,994.00	Yes
3.3	School Climate	3.3 EACS will build relationships by ensuring that all parents, students, and teachers feel that our schools are providing a safe, positive, inclusive, and welcoming learning environment.	\$52,212.00	No
3.4	Student Services	3.4 EACS will properly vet all newly hired Content and Community Providers to ensure standards alignment and safety for our students.	\$35,951.00	No
3.5	School Climate and School Safety	3.5 EACS will continue to maintain a safe learning environment for all students by training the teachers and staff on school-wide safety plans.		No
3.6	Communication and Translating Services	3.6 EACS will provide notices, reports, statements, or records sent to a student, parent, or guardian will be translated as needed. Documents, records, and statements will be sent upon request by clerical staff.	\$0.00	Yes
3.7	School Operating Services	3.7 EACS' operations of the charter are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.		No





# Goals and Actions

## Goal

Goal #	Description	Type of Goal
4	Excel Academy Charter School (EACS) will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all Educational Partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.	Broad Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

### An explanation of why the LEA has developed this goal.

#### Broad Goal:

With a focus on supporting our students to achieve their goal of high school graduation and college and career preparedness, the goal and actions/services focuses on monitoring each student's progress toward graduation. The continual monitoring of student data to identify struggling students and interventions is important to the success of our students staying on-track with course completion and on course to graduation. Graduation rate, college/career preparedness, and CTE participation are all metrics we monitor to ensure students are on track to graduate and to achieve their post-graduation goals.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.1	Graduation Rate Dropout Rate	Develop a baseline from 2023-2024 data			Increase the graduation rate and decrease the dropout rate	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.2	Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU preparedness			Increase the CTE participants and students who are UC/CSU prepared	
4.3	Access to a Broad Curriculum: College/Career Prepared Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	Develop a baseline for students enrolled in and completion of A-G courses required for UC/CSU Admission			Increase number of students enrolled in A-G courses required for UC/CSU Admission	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
4.1	College and Career Readiness and Career Technical Education	4.1 Consistent with California College and Career Indicators, develop a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals; continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.	\$6,718.00	No
4.2	High School Graduation	4.2 Students transitioning from middle to high school will be monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.	\$175,104.00	No
4.3	High School Curriculum and Instruction	4.3 Provide high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.	\$518,700.00	No
4.4	Testing	4.4 Ensure all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities.	\$15,436.00	Yes
4.5	Testing	4.5 Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.		Yes
4.6	A-G and Career Technical Education Courses	4.6 Expand our A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.	\$11,889.00	No

Action #	Title	Description	Total Funds	Contributing
4.7	Needs Assessment - Data Analysis	4.7 Analyze 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Provide targeted interventions and resources to students identified as needing additional support.		No

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2024-25]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$704,165	\$0.00

## Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
9.035%	0.000%	\$0.00	9.035%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

## Required Descriptions

### LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.2	<p><b>Action:</b> Student Monitoring</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b></p>	Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments is necessary to evaluate student progress and to identify areas of strength and needs within ELA and math domains. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	LEA-wide	academic growth, in addition to social-emotional awareness classes and character building.	
1.5	<p><b>Action:</b> Parent Training</p> <p><b>Need:</b> Parents - Home Educators</p> <p><b>Scope:</b> LEA-wide</p>	Providing parent training, learning opportunities, and workshops on a variety of topics will guide parents to provide the best educational support at home for their students.	Survey results Student academic progress and growth monitoring - assessments, learning period meeting attendance and work samples
1.7	<p><b>Action:</b> Student Monitoring and Support</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> LEA-wide</p>	Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments will provide the appropriate data to review student learner outcomes and provide students with the appropriate resources and interventions to meet grade level expectations. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students
3.2	<p><b>Action:</b> Educational Partner Partnerships</p> <p><b>Need:</b> Administrators, teachers, staff, parents, students, governing board, community/public</p> <p><b>Scope:</b> LEA-wide</p>	Engaging EACS educational partners in an intentional, meaningful, and consistent manner by monitoring student performance and providing timely interventions will help promote growth and success for students to meet their individual goals and meet or exceed grade level expectations.	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams



Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
			Growth and progress analysis from the teachers assigned to the students
3.6	<p><b>Action:</b> Communication and Translating Services</p> <p><b>Need:</b> Educational Partners - Parents, guardians, students</p> <p><b>Scope:</b> LEA-wide</p>	Ongoing communication in English and in the students' home language (upon request) keeps an open line of communication to better support individual student needs and keeps educational partners aware of policies, procedures, events, important notices, etc. that guide student learning.	Survey responses Teacher feedback Department lead feedback Attendance at school events
4.4	<p><b>Action:</b> Testing</p> <p><b>Need:</b> All students including low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> LEA-wide</p>	Ensuring that all students have the opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities, sets students up for success on the state assessments. CAASPP preparation includes oversight from assigned teacher to make sure the students are paced properly with their ELA and math curriculum, have intervention support if needed, tutoring support if needed, access to test prep packets, live test prep sessions with EACS teachers, and state practice tests.	Director of Assessment and Accountability Feedback Intervention Department Feedback Teacher Feedback CAASPP test scores
4.5	<p><b>Action:</b> Testing</p> <p><b>Need:</b> Low-income pupils and foster youth</p> <p><b>Scope:</b> LEA-wide</p>	Providing advanced placement exam costs for low-income and foster youth who are experiencing financial hardship provides students with the necessary support to complete exams.	Admission Team and High School Principal Feedback

**Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
1.2	<p><b>Action:</b> Student Monitoring</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> Limited to Unduplicated Student Group(s)</p>	<p>Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments is necessary to evaluate student progress and to identify areas of strength and needs withing ELA and math domains. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.</p>	<p>i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students</p>

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Services for our low-income, English Learners, and foster youth are targeted interventions that were identified through a collaborative effort with the school’s Executive Director, Director of Assessment and Accountability, Assistant Director of Intervention, High School Principal, and High School Counselors. The goals and actions in the LCAP are focused on increasing services and improving the quality of the academic support to improve student performance, educational partner engagement, and the level of college and career readiness of our student groups. Through a collaborative effort, the school leadership team, taking into account the feedback provided from all educational partners, identified the next steps to growth towards each of our goals. We expect to see improvement in student engagement and achievement as reflected in i-Ready and CAASPP test scores, and an increase in our graduation and college and career readiness rate.

### **Additional Concentration Grant Funding**

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

<b>Staff-to-student ratios by type of school and concentration of unduplicated students</b>	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	N/A	N/A
Staff-to-student ratio of certificated staff providing direct services to students	N/A	N/A

# 2024-25 Total Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	7,793,902	704,165	9.035%	0.000%	9.035%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$7,742,341.00	\$1,174,753.00	\$76,000.00	\$193,552.00	\$9,186,646.00	\$5,868,437.00	\$3,318,209.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Achievement	All	No				2022-25							
1	1.2	Student Monitoring	English Foster Low Learners Youth Income	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	2022-25							
1	1.3	Broad Course of Study	All	No				2022-25	\$5,214,600.00	\$2,636,515.00	\$6,531,120.00	\$1,080,564.00	\$76,000.00	\$163,431.00	\$7,851,115.00
1	1.4	Professional Development	All	No				2022-25	\$6,769.00	\$44,062.00		\$35,530.00		\$15,301.00	\$50,831.00
1	1.5	Parent Training	English Foster Low Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25							
1	1.6	Grade Level Curriculum and Instruction	All	No				2022-25							
1	1.7	Student Monitoring and Support	English Foster Low Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25	\$14,820.00	\$3,244.00		\$3,244.00		\$14,820.00	\$18,064.00
1	1.8	Needs Assessment - Data Analysis	All	No				2022-25	\$0.00	\$5,526.00		\$5,526.00			\$5,526.00
2	2.1	School Climate and Student Engagement	All	No				2022-25	\$33,936.00	\$0.00	\$33,936.00				\$33,936.00

Goal #	Action #	Action Title	Student Group(s)		Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
2	2.2	Certificated and Classified Salaries and Benefits	All		No				2022-25	\$99,220.00	\$0.00	\$99,220.00				\$99,220.00
2	2.3	Educational Partner Communication	All		No				2022-25	\$0.00	\$19,950.00	\$19,950.00				\$19,950.00
2	2.4	Technology	All		No				2022-25	\$0.00	\$38,000.00		\$38,000.00			\$38,000.00
2	2.5	Professional Development	All		No				2022-25							
3	3.1	Educational Partner Engagement	All		No				2022-25							
3	3.2	Educational Partner Partnerships	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25	\$253,994.00	\$0.00	\$253,994.00				\$253,994.00
3	3.3	School Climate	All		No				2022-25	\$0.00	\$52,212.00	\$52,212.00				\$52,212.00
3	3.4	Student Services	All		No				2022-25	\$35,951.00	\$0.00	\$35,951.00				\$35,951.00
3	3.5	School Climate and School Safety	All		No				2022-25							
3	3.6	Communication and Translating Services	English	Learners	Yes	LEA-wide	English Learners	All Schools	2022-25	\$0.00	\$0.00	\$0.00				\$0.00
3	3.7	School Operating Services	All		No				2022-25							
4	4.1	College and Career Readiness and Career Technical Education	All		No				2022-25	\$6,718.00	\$0.00	\$6,718.00				\$6,718.00
4	4.2	High School Graduation	All		No				2022-25	\$175,104.00	\$0.00	\$175,104.00				\$175,104.00
4	4.3	High School Curriculum and Instruction	All		No				2022-25	\$0.00	\$518,700.00	\$518,700.00				\$518,700.00
4	4.4	Testing	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25	\$15,436.00	\$0.00	\$15,436.00				\$15,436.00
4	4.5	Testing	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25							

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
4	4.6	A-G and Career Technical Education Courses	All	No				2022-25	\$11,889.00	\$0.00		\$11,889.00			\$11,889.00
4	4.7	Needs Assessment - Data Analysis	All	No				2022-25							

# 2024-25 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
7,793,902	704,165	9.035%	0.000%	9.035%	\$269,430.00	0.000%	3.457 %	<b>Total:</b>	\$269,430.00
								<b>LEA-wide Total:</b>	\$269,430.00
								<b>Limited Total:</b>	\$0.00
								<b>Schoolwide Total:</b>	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.2	Student Monitoring	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		
1	1.5	Parent Training	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
1	1.7	Student Monitoring and Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
3	3.2	Educational Partner Partnerships	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$253,994.00	
3	3.6	Communication and Translating Services	Yes	LEA-wide	English Learners	All Schools	\$0.00	
4	4.4	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$15,436.00	



Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
4	4.5	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		

# 2023-24 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
Totals	\$7,358,118.00	\$7,359,218.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Student Achievement	No		
1	1.2	Student Monitoring	Yes		
1	1.3	Broad Course of Study	No	\$6,267,670.00	\$6,147,379.00
1	1.4	Professional Development	No	\$49,640.00	\$42,382.00
1	1.5	Parent Training	Yes		
1	1.6	Grade Level Curriculum and Instruction	No		
1	1.7	Student Monitoring and Support	Yes	\$31,378.00	\$30,100.00
1	1.8	Needs Assessment - Data Analysis	No	\$4,945.00	\$4,945.00
2	2.1	School Climate and Student Engagement	No	\$27,922.00	\$27,166.00
2	2.2	Certificated and Classified Salaries and Benefits	No	\$83,136.00	\$97,962.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.3	Educational Partner Communication	No	\$12,488.00	\$12,488.00
2	2.4	Technology	No	\$68,000.00	\$47,709.00
2	2.5	Professional Development	No		
3	3.1	Educational Partner Engagement	No		
3	3.2	Educational Partner Partnerships	Yes	\$213,551.00	\$256,994.00
3	3.3	School Climate	No	\$33,870.00	\$32,150.00
3	3.4	Student Services	No	\$31,572.00	\$37,417.00
3	3.5	School Climate and School Safety	No		
3	3.6	Communication and Translating Services	Yes	\$3,250.00	\$3,250.00
3	3.7	School Operating Services	No		
4	4.1	College and Career Readiness and Career Technical Education	No	\$8,200.00	\$4,000.00
4	4.2	High School Graduation	No	\$107,374.00	\$163,410.00
4	4.3	High School Curriculum and Instruction	No	\$322,034.00	\$359,920.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	4.4	Testing	Yes	\$76,742.00	\$75,600.00
4	4.5	Testing	Yes		
4	4.6	A-G and Career Technical Education Courses	No	\$16,346.00	\$16,346.00
4	4.7	Needs Assessment - Data Analysis	No		

# 2023-24 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$621,189.00	\$309,496.00	\$352,939.00	(\$43,443.00)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
startcol lapse							
1	1.2	Student Monitoring	Yes				
1	1.5	Parent Training	Yes				
1	1.7	Student Monitoring and Support	Yes	\$15,953.00	\$15,953.00		
3	3.2	Educational Partner Partnerships	Yes	\$213,551.00	\$256,994.00		
3	3.6	Communication and Translating Services	Yes	\$3,250.00	\$3,250.00		
4	4.4	Testing	Yes	\$76,742.00	\$76,742.00		
4	4.5	Testing	Yes				

To Add a Row: Click "Add Row."

To Delete a Row: Remove all content from each cell, checkbox and dropdown of a row (including spaces), press "Save Data" and refresh the page.

# 2023-24 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
	\$621,189.00	0.00	0.000%	\$352,939.00	0.000%	0.000%	\$0.00	0.000%

# Local Control and Accountability Plan Instructions

## [Plan Summary](#)

## [Engaging Educational Partners](#)

## [Goals and Actions](#)

## [Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [LCFF@cde.ca.gov](mailto:LCFF@cde.ca.gov).

## Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
  - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
    - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (*EC* sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.



# Plan Summary

## Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

## Requirements and Instructions

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

### Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

### Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

### **Comprehensive Support and Improvement**

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

#### Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

#### Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

#### Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## **Engaging Educational Partners**

### **Purpose**

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

### **Requirements**

**School districts and COEs:** *EC* sections [52060\(g\) \(California Legislative Information\)](#) and [52066\(g\) \(California Legislative Information\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

**Charter schools:** *EC* Section [47606.5\(d\) \(California Legislative Information\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062 \(California Legislative Information\)](#);
  - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).

- For COEs, see [Education Code Section 52068 \(California Legislative Information\)](#); and
- For charter schools, see [Education Code Section 47606.5 \(California Legislative Information\)](#).
- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

## Instructions

### Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

### Complete the table as follows:

#### Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

#### Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is not necessarily limited to:
  - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
  - Inclusion of metrics other than the statutorily required metrics
  - Determination of the target outcome on one or more metrics
  - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
  - Inclusion of action(s) or a group of actions
  - Elimination of action(s) or group of actions
  - Changes to the level of proposed expenditures for one or more actions
  - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
  - Analysis of effectiveness of the specific actions to achieve the goal
  - Analysis of material differences in expenditures
  - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
  - Analysis of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

### Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
  - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

### Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

#### Focus Goal(s)

##### Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

##### Type of Goal

Identify the type of goal being implemented as a Focus Goal.

##### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

##### An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

### Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

#### Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
- (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
  - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
  - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

#### Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

#### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

#### An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.



- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
  - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

**Note:** EC Section [42238.024\(b\)\(1\) \(California Legislative Information\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

## Broad Goal

### Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.
- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

### Type of Goal

Identify the type of goal being implemented as a Broad Goal.

### State Priorities addressed by this goal.



Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

### **Maintenance of Progress Goal**

#### Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

#### Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

#### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

### **Measuring and Reporting Results:**

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.
- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
  - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
  - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
  - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

Complete the table as follows:

Metric #
<ul style="list-style-type: none"> <li>• Enter the metric number.</li> </ul>
Metric
<ul style="list-style-type: none"> <li>• Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.</li> </ul>
Baseline
<ul style="list-style-type: none"> <li>• Enter the baseline when completing the LCAP for 2024–25.                             <ul style="list-style-type: none"> <li>○ Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).</li> <li>○ Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.</li> <li>○ Indicate the school year to which the baseline data applies.</li> <li>○ The baseline data must remain unchanged throughout the three-year LCAP.                                     <ul style="list-style-type: none"> <li>▪ This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain</li> </ul> </li> </ul> </li> </ul>

accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.

- If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
- Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

## Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
  - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

## Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.
  - Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

## Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
  - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

## Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
  - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the **Measuring and Reporting Results** part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2025–26</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2026–27</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2025–26</b> and <b>2026–27</b> . Leave blank until then.

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

**Note:** When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
  - Include a discussion of relevant challenges and successes experienced with the implementation process.
  - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

## A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
  - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
  - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
  - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

## A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
  - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:
    - The reasons for the ineffectiveness, and
    - How changes to the action will result in a new or strengthened approach.

### **Actions:**

Complete the table as follows. Add additional rows as necessary.

#### Action #

- Enter the action number.

#### Title

- Provide a short title for the action. This title will also appear in the action tables.

#### Description

- Provide a brief description of the action.

- For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
- As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
- These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

## Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

## Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
  - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496 in the Increased or Improved Services section of the LCAP.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

## Required Actions

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
  - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
  - Professional development for teachers.
  - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.
- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
  - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
  - These required actions will be effective for the three-year LCAP cycle.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA’s description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

### Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC* Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).



## LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

### For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

## Requirements and Instructions

Complete the tables as follows:

### Total Projected LCFF Supplemental and/or Concentration Grants

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

### Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

### Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

### LCFF Carryover — Percentage



- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

### LCFF Carryover — Dollar

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

### Total Percentage to Increase or Improve Services for the Coming School Year

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA's percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

## Required Descriptions:

### LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

### Identified Need(s)

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

### How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.

- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

### **Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

**Note for COEs and Charter Schools:** In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

### **Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

### **Identified Need(s)**

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

### **How the Action(s) are Designed to Address Need(s)**

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

### **Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

### **Additional Concentration Grant Funding**

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.
- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
  - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

- The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
  - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
  - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

## Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

## Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8).

Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***
- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.

- **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
- **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate “All Schools.” If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter “Specific Schools” or “Specific Grade Spans.” Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year,” or “2 Years,” or “6 Months.”
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.
- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
  - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
  - **Note:** Equity Multiplier funds must be included in the “Other State Funds” category, not in the “LCFF Funds” category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA’s LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as



a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.

- As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

## Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

## Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

## Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
  - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

### Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
  - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**



- This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

### **Contributing Actions Annual Update Table**

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**
  - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
  - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
  - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

### **LCFF Carryover Table**

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**

- This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.

- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**

- This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).

- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education  
November 2023



## 2023–24 Local Control and Accountability Plan Annual Update

The instructions for completing the 2023–24 Local Control and Accountability Plan (LCAP) Annual Update follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Warner	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

## Goals and Actions

### Goal

Goal #	Description
1	Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in ELA CAASPP in 2020-21. A baseline will be developed from 2021-22 CAASPP data.	2021-2022 CAASPP Overall ELA Scores - Warner 66% met or exceeded grade level standard 22% standard nearly met 12% standard not met	2022-2023 CAASPP Overall ELA Scores - Warner 66% met or exceeded grade level standards 20% standard nearly met 14% standard not met	Increase the number of students that have met or exceeded grade level proficiency by 2% each year.
CAASPP Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in math CAASPP in 2020-21. A baseline will be developed from 2021-22 CAASPP data.	2021-2022 CAASPP Overall Math Scores - Warner 54% met or exceeded grade level standard 26% standard nearly met 20% standard not met	2022-2023 CAASPP Overall Math Scores - Warner 56% met or exceeded grade level standards 25% standard nearly met 19% standard not met	Increase the number of students that have met or exceeded grade level proficiency by 2% each year.
i-Ready ELA Increase the number of students that have met or exceeded	2021 i-Ready ELA Fall Scores ALL Tier 1: 65.7%	2022 i-Ready ELA Spring Scores ALL Tier 1: 80.5%	2023 i-Ready ELA Spring Scores ALL Tier 1: 78.8%	2024 i-Ready ELA Spring Scores ALL Tier 1: 74.7%	Decrease Tier III percentage by 2% each year

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
grade level proficiency by 2% each year.	Tier 2: 23.6% Tier 3: 10.7%  English Learners Tier 1: 39.5% Tier 2: 32.6% Tier 3: 27.9%  Economically Disadvantaged Tier 1: 55.7% Tier 2: 26% Tier 3: 18.3%  Students w/ IEPs Tier 1: 34.8% Tier 2: 31.9% Tier 3: 33.3%	Tier 2: 13.8% Tier 3: 5.7%  English Learners Tier 1: 76.7% Tier 2: 6.7% Tier 3: 16.7%  Economically Disadvantaged Tier 1: 74.9% Tier 2: 17.5% Tier 3: 7.7%  Students w/ IEPs Tier 1: 50.5% Tier 2: 21.6% Tier 3: 27.8%	Tier 2: 13.2% Tier 3: 7.9%  English Learners Tier 1: 47.4% Tier 2: 36.8% Tier 3: 15.8%  Economically Disadvantaged Tier 1: 73.4% Tier 2: 16.8% Tier 3: 9.8%  Students with IEPs Tier 1: 49.3% Tier 2: 17.8% Tier 3: 32.9%	Tier 2: 15% Tier 3: 10.3%  English Learners Tier 1: 67% Tier 2: 27% Tier 3: 6%  Economically Disadvantaged Tier 1: 68% Tier 2: 20% Tier 3: 12%  Students w/ IEPs Tier 1: 47% Tier 2: 15% Tier 3: 38%	
i-Ready Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready Math Fall Scores ALL Tier 1: 52.6% Tier 2: 34.4% Tier 3: 13%  English Learners Tier 1: 36.4% Tier 2: 45.5% Tier 3: 18.2%  Economically Disadvantaged Tier 1: 40.6% Tier 2: 38.1%	2022 i-Ready Math Spring Scores ALL Tier 1: 74.2% Tier 2: 17.7% Tier 3: 8.1%  English Learners Tier 1: 63.3% Tier 2: 30% Tier 3: 6.7%  Economically Disadvantaged Tier 1: 68.5% Tier 2: 20.8%	2023 i-Ready Math Spring Scores ALL Tier 1: 72.6% Tier 2: 18.3% Tier 3: 9.1%  English Learners Tier 1: 68.4% Tier 2: 21.1% Tier 3: 10.5%  Economically Disadvantaged Tier 1: 68% Tier 2: 20.9%	2024 i-Ready Math Fall Scores ALL Tier 1: 68.8% Tier 2: 19% Tier 3: 12.3%  English Learners Tier 1: 52% Tier 2: 33% Tier 3: 15%  Economically Disadvantaged Tier 1: 63% Tier 2: 21%	Decrease Tier III percentage by 2% each year

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	Tier 3: 21.3%  Students w/ IEPs Tier 1: 31.9% Tier 2: 26.4% Tier 3: 41.7%	Tier 3: 10.7%  Students w/ IEPs Tier 1: 48% Tier 2: 18.4% Tier 3: 33.7%	Tier 3: 11%  Students with IEPs Tier 1: 37.5% Tier 2: 23.6% Tier 3: 38.9%	Tier 3: 16%  Students w/ IEPs Tier 1: 42% Tier 2: 11% Tier 3: 47%	
Increase ELPAC levels annually	A baseline will be developed from 2021-22 Summative ELPAC data.	Summative ELPAC results will be published by the state in the summer or fall of 2022.	Summative ELPAC results will be published by the state in the summer or fall of 2023.	Summative ELPAC results will be published by the state in the summer or fall of 2024.	Increase ELPAC proficiency by 2% each year.
State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with 2021 local indicator outcomes.	Full Implementation for Next Generation Science Standards and Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, and history - social science.  Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics and	Full Implementation for Next Generation Science Standards and Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, and history - social science.  Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics and	Full Implementation for Next Generation Science Standards and Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, and history - social science.  Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics and	Excel Academy will maintain implementation and sustainability of the State Standards against the CDE State Standards Reflection Tool.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		history - social science.	history - social science.	history - social science.	
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	Maintain 100% of teachers are appropriately credentialed for the courses they teach
State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	Excel Academy will maintain the availability of online, textbook, and teacher created curriculum to meet the individual needs of our students

## Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 1 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

All actions that are aligned to goal 1 were implemented and successful based on student progress and data analysis. The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

Effectiveness of 1.1: Excel Academy increased the academic achievement of all students by evaluating student assessments through in depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in English language arts and mathematics. EACS students surpassed the percentage of students meeting or exceeding grade level standards on the CAASPP. Fall to spring i-Ready data showed significant growth each year across all ELA and math domains. Data was analyzed and interventions were in place to provide students the necessary resources and support to make progress. In 2024, 25% of students in the WIN Intervention Program reached proficiency in the spring in math and reading. 63% of students in the math, ELA, and ELD intervention classes grew by one grade level or more from fall to spring. 73% of the EACS identified homeless and foster youth populations, served through general education, are proficient in math and ELA based on the spring i-Ready benchmark assessment data.

Effectiveness of 1.2: Excel Academy monitored low-income pupils, foster youth, English Learners (including LTEL students), and students with disabilities for proficiency on local assessments to review student learner outcomes and ensure academic success. In addition, Excel Academy successfully implemented and offered programs to promote academic growth as well as social-emotional learning (SEL) and awareness and character building. Students attended the offered sessions and connected with their peers.

Effectiveness of 1.3: All students were provided access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels and were assisted, supported, and guided in completing standards-aligned content by their assigned teacher.

Effectiveness of 1.4: The staff has attended professional development throughout the year to provide best practices and services to serve students and parents. Students and parents are provided with the necessary information, resources, and support to meet the individual needs of the student.

Effectiveness of 1.5: Parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, and Back to School events were provided for all parents. In 2024, a Parent Power-Up was held for parents and students across all grade levels to provide educational workshops for home educators and activities for the students.

Effectiveness of 1.6: Students were provided with instructional strategies connected to the equity-based grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners. Progress was assessed during learning period meetings and live class sessions with the assigned teachers.

Effectiveness of 1.7: Students performing one or more years below grade level through the What I Need (WIN) intervention program were monitored throughout the school year and provided with individualized support. Students were required to participate in weekly intervention programs that are monitored by the credentialed teacher.



Effectiveness of 1.8: Excel Academy has analyzed and tracked the historical i-Ready data to drive our policies, curriculum, and program decisions. The results have influenced the decision to target specific students who need live instruction and additional curriculum and resources to meet targeted goals. The effectiveness of 1.8 relates to the effectiveness of 1.7 because this targeted analysis provided the intervention department with the data to identify students who were performing below grade level and who needed the additional support.

Once the CAASPP data is collected from 2024, the data will be analyzed and the staff will determine the domains that need to be targeted within ELA and math across specific grade levels.

Impact on Student Learning: Students have benefited academically from the increase of support provided by EACS teachers and intervention teams. They have observed an increase in student performance on the i-Ready local assessment, strong CAASPP baseline results, and graduation rates. They have also observed an increase in student participation in interventions and services to support academic achievement.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

## Goals and Actions

### Goal

Goal #	Description
2	We will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Maintain or decrease Chronic Absenteeism rate of .01%	A baseline will be developed from 2020-21 data	Cumulative Enrollment: 1189, Chronic Absenteeism Count: 6, Chronic Absenteeism Rate: 0.5%	Cumulative Enrollment: 1048, Chronic Absenteeism Count: 14, Chronic Absenteeism Rate: 1.0%	Cumulative Enrollment as of 2/2/2024 - 991	Maintain an Absenteeism Rate of .01% or less
Strive for 0% Expulsion Rate each year	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate	Maintain 0% Expulsion Rate
Strive for 0% Suspension Rate each year	0% Suspension Rate	0% Suspension Rate	0% Suspension Rate	0% Suspension Rate	Maintain 0% Suspension Rate
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach.	100% of teachers are appropriately credentialed for the courses they teach.	100% of teachers are appropriately credentialed for the courses they teach.	100% of teachers are appropriately credentialed for the courses they teach.	Maintain 100% of teachers are appropriately credentialed for the courses they teach.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24

## Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 2 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

Effectiveness 2.1: Excel Academy focused on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides. Excel Academy is transparent in terms of making sure that parents and guardians are aware of the policies, procedures, and requirements that are in place.

Effectiveness 2.2: Excel Academy recruited and retained highly qualified multiple and single-subject teachers and classified staff, and was able to maintain appropriate assignments and competitive salaries and benefits.

Effectiveness 2.3: Excel Academy provided frequent communication with parents/guardians/students by notifying them of school events, opportunities, and resources through our main communication platform called Beehively, emails, the school website, and social media platforms. Excel Academy built partnerships for student outcomes by sending notification of surveys, parent informational meetings (i.e. ELAC, SSC, and PAC), and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.

Effectiveness 2.4: Excel Academy focused on purchasing technological devices and provided professional development to promote student engagement, support, and access to instruction as needed.

Effectiveness 2.5: Excel Academy focused on providing cultural awareness by inviting students and parents to share about their cultures and traditions during ELAC and SSC meetings which increased meeting attendance and helped to foster cultural awareness. EACS continues to make cultural awareness a priority.

Impact on Student Learning: The increase in attendance and the interventions in place supported progress in both ELA and mathematics as indicated by internal data results.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

## Goals and Actions

### Goal

Goal #	Description
3	We will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2020-2021 Maintain or increase by 2%	Year 1 Outcome - 2021-2022 220 Responses from Educational Partners There were more responses that impacted the overall percentages. With a 96% and 98% approval rate, Excel Academy is excelling in all areas mentioned below.	Year 2 Outcome - 2022-2023 304 Responses from Educational Partners There were more responses that impacted the overall percentages. Excel Academy is excelling in all areas mentioned below.	Year 3 Outcome - 2023-2024 351 Responses from Educational Partners There were more responses that impacted the overall percentages. Excel Academy is excelling in all areas mentioned below, and there was an increase in percentages for several questions.	Maintain or increase by 2%
State Local Indicator Priority 6: Overall Satisfaction Rate Survey Results Maintain or increase by 2% each year	Overall Satisfaction Report: Based on 66 responses from parents/guardians	Overall Satisfaction Report: Based on 220 responses from parents/guardians	Overall Satisfaction Report: Based on 304 responses from parents/guardians	Overall Satisfaction Report: Based on 351 responses from parents/guardians	Maintain or increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	<p>97.6% of survey respondents agree that the school has supported students attaining their academic goals.</p> <p>98.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child’s education.</p> <p>98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.</p>	<p>96.4% of survey respondents agree that the school has supported students attaining their academic goals.</p> <p>98.2% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child’s education.</p> <p>98.2% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.</p>	<p>95.7% of survey respondents agree that the school has supported students attaining their academic goals.</p> <p>96.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child’s education.</p> <p>98.4% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.</p>	<p>98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)</p> <p>98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child’s education. (2% increase from 2023)</p> <p>98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)</p>	
<p>Safety Plan Review and Training</p>	<p>Annual Review/Updates and Training Dates</p>	<p>The school safety plan was last reviewed and updated with staff in March of 2022.</p>	<p>The school safety plan was last reviewed and updated with staff in March of 2023.</p>	<p>The school safety plan was last reviewed and updated with staff in March of 2024.</p>	<p>Annual Review and Training Date</p>

## Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 3 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

Effectiveness 3.1: Excel Academy sought out parent input and assessed our level of educational partner engagement through parent participation in Learning Period (LP), ELAC, SSC, and PAC meetings, surveys, Student Council, and SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have had opportunities for participation and input.

Effectiveness 3.2: Excel Academy engaged educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success. EACS built partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.

Effectiveness 3.3: Based on the survey results and stakeholder feedback, Excel Academy successfully built relationships by ensuring that all parents, students, and teachers felt that our school provided a safe, positive, inclusive, and welcoming learning environment.

Effectiveness 3.4: Excel Academy properly vetted all newly hired Content and Community Providers to ensure standards alignment and safety for our students were met at all times.

Effectiveness 3.5: Excel Academy maintains a safe learning environment for all students by training the teachers and staff on school-wide safety plans. The school-wide safety plans are updated as deemed necessary and appropriate and shared with stakeholders to provide transparency and accountability. The safety plan may be viewed upon request. The school safety plan ensures emergency preparedness at learning period meetings, test sites, field trips, staff meetings, and at the school office. It also encompasses required trainings and school

expectations in regards to a mandated reporter, sexual harassment, blood borne pathogens, and active shooters. The expectations of conduct for students, parents, guardians, and staff, bullying and hate crime reporting are also included.

Effectiveness 3.6: Excel Academy notices, reports, statements, or records sent to a student, parent, or guardian were translated as needed and upon request. Documents, records, and statements were sent upon request by clerical staff.

Effectiveness 3.7: Operations of Excel Academy are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.

Impact on Student Learning: Increase in participation on the LCAP feedback survey for all educational partners. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships. EACS recognizes a continued need to increase parent participation in SSC, ELAC and PAC meetings.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**



## Goals and Actions

### Goal

Goal #	Description
4	We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all educational partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Graduation Rate Dropout Rate	Develop a baseline from 2020-21 data.	2020-21: 89.7% Graduation Rate 2020-21: 4.8% Dropout Rate	2021-22: 87.2%Graduation Rate 2021-22: Dropout Rate	2022-23 - 97.7% Graduation Rate 2022-23 - 0% Dropout Rate	Increase the graduation rate by 2%
Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU prepared	2020-21: Number of Students participating in CTE: 27	2021-22: Number of Students participating in CTE: 9	2022-23 - Number of Students participating in CTE: 10	Increase the % of College/Career Prepared students by 2%
Access to a Broad Curriculum: College/Career Prepared	2019-20 Graduates completed all courses for UC/CSU Admission: 0	2020-21: Students enrolled in UC/CSU required courses for admission: 49.03%	2021-22: Students enrolled in UC/CSU required courses for admission: 84	2022-23: Students enrolled in UC/CSU required courses for admission: 118	Increase the A-G course participation and completion annually by 2% to increase the College/Career Prepared Rate
Pupils enrolled in and completion of A-G courses required for UC/CSU Admission		Completed All Courses Required for UC/CSU Admission: 0	Completed All Courses Required for UC/CSU Admission: 1	Completed All Courses Required for UC/CSU Admission: 12	

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24

## Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 4 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

Effectiveness 4.1: Consistent with California College and Career Indicators, Excel Academy has developed a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals, and continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.

Effectiveness 4.2: Students transitioning from middle to high school are monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.

Effectiveness 4.3: Excel Academy provides high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Excel Academy works to review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.

Effectiveness 4.4: Excel Academy ensures all students have the opportunity for intensive CAASPP preparation, specifically low income, EL students, foster-youth, and students with disabilities. Grade level test prep packets in ELA and math, the teacher led performance test prep sessions, and practice tests are designed to assist students in preparation for testing.

Effectiveness 4.5: Excel Academy covers the Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.

Effectiveness 4.6: Excel Academy is working to expand A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.

Effectiveness 4.7: Excel Academy analyzes 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Excel Academy provides targeted interventions and resources to students identified as needing additional support.

Impact on Student Learning: Excel Academy removed barriers such as Advanced Placement exam costs for low income and foster-youth students experiencing financial hardship, and observed greater student interest in Advanced Placement (AP), CTE, and A-G courses. The continued goal is to increase enrollment in these courses.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

## Goals and Actions

### Goal

Goal #	Description
5	

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24

### Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

## Instructions

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education’s (CDE’s) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).

Complete the prompts as instructed for each goal included in the 2023–24 LCAP. Duplicate the tables as needed. The 2023–24 LCAP Annual Update must be included with the 2024–25 LCAP.

## Goals and Actions

### Goal(s)

#### Description:

Copy and paste verbatim from the 2023–24 LCAP.

#### Measuring and Reporting Results

- Copy and paste verbatim from the 2023–24 LCAP.

#### Metric:

- Copy and paste verbatim from the 2023–24 LCAP.

#### Baseline:

- Copy and paste verbatim from the 2023–24 LCAP.

#### Year 1 Outcome:

- Copy and paste verbatim from the 2023–24 LCAP.

#### Year 2 Outcome:

- Copy and paste verbatim from the 2023–24 LCAP.

#### Year 3 Outcome:

- When completing the 2023–24 LCAP Annual Update, enter the most recent data available. Indicate the school year to which the data applies.

#### Desired Outcome for 2023–24:

- Copy and paste verbatim from the 2023–24 LCAP.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Copy and paste verbatim from the 2023–24 LCAP.	Copy and paste verbatim from the 2023–24 LCAP.	Copy and paste verbatim from the 2023–24 LCAP.	Copy and paste verbatim from the 2023–24 LCAP.	Enter information in this box when completing the 2023–24 LCAP Annual Update.	Copy and paste verbatim from the 2023–24 LCAP.

### Goal Analysis

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

A description of any substantive differences in planned actions and actual implementation of these actions.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

- Describe the effectiveness or ineffectiveness of the specific actions in making progress toward the goal during the three-year LCAP cycle. “Effectiveness” means the degree to which the actions were successful in producing the desired result and “ineffectiveness” means that the actions did not produce any significant or desired result.
  - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
  - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
  - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
  - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:
    - The reasons for the ineffectiveness, and
    - How changes to the action will result in a new or strengthened approach.

California Department of Education  
November 2023



## 2023–24 Local Control and Accountability Plan Annual Update

The instructions for completing the 2023–24 Local Control and Accountability Plan (LCAP) Annual Update follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Helendale	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122



## Goals and Actions

### Goal

Goal #	Description
1	Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in ELA CAASPP in 2020-21. A baseline will be developed from 2021-22 CAASPP data.	2021-2022 CAASPP Overall ELA Scores - Helendale 59% met or exceeded grade level standard 23% standard nearly met 18% standard not met	2022-2023 CAASPP Overall ELA Scores - Helendale 60% met or exceeded grade level standards 22% standard nearly met 18% standard not met	Increase the number of students that have met or exceeded grade level proficiency by 2% each year.
CAASPP Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2021-22 CAASPP data.	Due to the pandemic, Excel Academy did not participate in math CAASPP in 2020-21. A baseline will be developed from 2021-22 CAASPP data.	2021-2022 CAASPP Overall Math Scores - Helendale 48% met or exceeded grade level standard 22% standard nearly met 30% standard not met	2022-2023 CAASPP Overall Math Scores - Helendale 48% met or exceeded grade level standards 28% standard nearly met 24% standard not met	Increase the number of students that have met or exceeded grade level proficiency by 2% each year.
i-Ready ELA Increase the number of students that have met or exceeded	2021 i-Ready ELA Fall Scores ALL Tier 1: 62.2%	2022 i-Ready ELA Spring Scores ALL Tier 1: 76%	2023 i-Ready ELA Spring Scores ALL Tier 1: 76.3%	2024 i-Ready ELA Spring Scores ALL Tier 1: 72.2%	Decrease Tier III percentage by 2% each year

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
grade level proficiency by 2% each year.	Tier 2: 23.7% Tier 3: 14.1%	Tier 2: 15.2% Tier 3: 8.8%	Tier 2: 13.1% Tier 3: 10.5%	Tier 2: 14.8% Tier 3: 13%	
	English Learners Tier 1: 42.9% Tier 2: 35.7% Tier 3: 21.4%	English Learners Tier 1: 65.2% Tier 2: 8.7% Tier 3: 26.1%	English Learners Tier 1: 56.3% Tier 2: 18.8% Tier 3: 25%	English Learners Tier 1: 50% Tier 2: 15% Tier 3: 35%	
	Economically Disadvantaged Tier 1: 62.1% Tier 2: 18.6% Tier 3: 19.3%	Economically Disadvantaged Tier 1: 66.5% Tier 2: 21.9% Tier 3: 11.6%	Economically Disadvantaged Tier 1: 69.8% Tier 2: 16.5% Tier 3: 13.6%	Economically Disadvantaged Tier 1: 66% Tier 2: 15% Tier 3: 19%	
	Students w/ IEPs Tier 1: 40% Tier 2: 27.5% Tier 3: 32.5%	Students with IEPs Tier 1: 46.7% Tier 2: 20% Tier 3: 33.3%	Students with IEPs Tier 1: 34.8% Tier 2: 19.6% Tier 3: 45.7%	Students with IEPs Tier 1: 32% Tier 2: 19% Tier 3: 49%	
i-Ready Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2021 i-Ready Math Fall Scores ALL Tier 1: 47.4% Tier 2: 30.9% Tier 3: 21.7%	2022 i-Ready Math Spring Scores ALL Tier 1: 68.3% Tier 2: 19.6% Tier 3: 12.1%	2023 i-Ready Math Spring Scores ALL Tier 1: 68.8% Tier 2: 20.2% Tier 3: 11.1%	2024 i-Ready Math Spring Scores ALL Tier 1: 63.1% Tier 2: 22.5% Tier 3: 14.3%	Decrease Tier III percentage by 2% each year
	English Learners Tier 1: 51.9% Tier 2: 25.9% Tier 3: 22.2%	English Learners Tier 1: 65.2% Tier 2: 17.4% Tier 3: 17.4%	English Learners Tier 1: 75% Tier 2: 6.3% Tier 3: 18.8%	English Learners Tier 1: 43% Tier 2: 33% Tier 3: 24%	
	Economically Disadvantaged Tier 1: 48.2% Tier 2: 26.6%	Economically Disadvantaged Tier 1: 62.6% Tier 2: 21.5%	Economically Disadvantaged Tier 1: 62.1% Tier 2: 25.5%	Economically Disadvantaged Tier 1: 58% Tier 2: 24%	

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	Tier 3: 25.2%  Students w/ IEPs Tier 1: 27.5% Tier 2: 22.5% Tier 3: 50%	Tier 3: 15.9%  Students with IEPs Tier 1: 39.7% Tier 2: 19% Tier 3: 41.4%	Tier 3: 12.3%  Students with IEPs Tier 1: 30.4% Tier 2: 19.6% Tier 3: 50%	Tier 3: 19%  Students with IEPs Tier 1: 31% Tier 2: 20% Tier 3: 49%	
Increase ELPAC levels annually	A baseline will be developed from 2021-22 Summative ELPAC data.	Summative ELPAC results will be published by the state in the summer or fall of 2022.	Summative ELPAC results will be published by the state in the summer or fall of 2023.	Summative ELPAC results will be published by the state in the summer or fall of 2024.	Increase ELPAC proficiency by 2% each year.
State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with 2021 local indicator outcomes.	Full Implementation for Next Generation Science Standards and Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, and history - social science.  Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics and	Full Implementation for Next Generation Science Standards and Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, and history - social science.  Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics and	Full Implementation for Next Generation Science Standards and Full Implementation and Sustainability in providing professional learning for teaching to the academic standards in ELA, ELD, mathematics, and history - social science.  Full Implementation and Sustainability in making instructional materials that are aligned to the academic standards available ELA, ELD, mathematics and	Excel Academy will maintain implementation and sustainability of the State Standards against the CDE State Standards Reflection Tool.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
		history - social science.	history - social science.	history - social science.	
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	100% of teachers are appropriately credentialed for the courses they teach	Maintain 100% of teachers are appropriately credentialed for the courses they teach
State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials	Excel Academy will maintain the availability of online, textbook, and teacher created curriculum to meet the individual needs of our students

## Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 1 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

All actions that are aligned to goal 1 were implemented and successful based on student progress and data analysis. The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

Effectiveness of 1.1: Excel Academy increased the academic achievement of all students by evaluating student assessments through in depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in English language arts and mathematics. EACS students surpassed the percentage of students meeting or exceeding grade level standards on the CAASPP. Fall to spring i-Ready data showed significant growth each year across all ELA and math domains. Data was analyzed and interventions were in place to provide students the necessary resources and support to make progress. In 2024, 25% of students in the WIN Intervention Program reached proficiency in the spring in math and reading. 63% of students in the math, ELA, and ELD intervention classes grew by one grade level or more from fall to spring. 73% of the EACS identified homeless and foster youth populations, served through general education, are proficient in math and ELA based on the spring i-Ready benchmark assessment data.

Effectiveness of 1.2: Excel Academy monitored low-income pupils, foster youth, English Learners (including LTEL students), and students with disabilities for proficiency on local assessments to review student learner outcomes and ensure academic success. In addition, Excel Academy successfully implemented and offered programs to promote academic growth as well as social-emotional learning (SEL) and awareness and character building. Students attended the offered sessions and connected with their peers.

Effectiveness of 1.3: All students were provided access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels and were assisted, supported, and guided in completing standards-aligned content by their assigned teacher.

Effectiveness of 1.4: The staff has attended professional development throughout the year to provide best practices and services to serve students and parents. Students and parents are provided with the necessary information, resources, and support to meet the individual needs of the student.

Effectiveness of 1.5: Parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, and Back to School events were provided for all parents. In 2024, a Parent Power-Up was held for parents and students across all grade levels to provide educational workshops for home educators and activities for the students.

Effectiveness of 1.6: Students were provided with instructional strategies connected to the equity-based grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners. Progress was assessed during learning period meetings and live class sessions with the assigned teachers.

Effectiveness of 1.7: Students performing one or more years below grade level through the What I Need (WIN) intervention program were monitored throughout the school year and provided with individualized support. Students were required to participate in weekly intervention programs that are monitored by the credentialed teacher.

Effectiveness of 1.8: Excel Academy has analyzed and tracked the historical i-Ready data to drive our policies, curriculum, and program decisions. The results have influenced the decision to target specific students who need live instruction and additional curriculum and resources to meet targeted goals. The effectiveness of 1.8 relates to the effectiveness of 1.7 because this targeted analysis provided the intervention department with the data to identify students who were performing below grade level and who needed the additional support.

Once the CAASPP data is collected from 2024, the data will be analyzed and the staff will determine the domains that need to be targeted within ELA and math across specific grade levels.

Impact on Student Learning: Students have benefited academically from the increase of support provided by EACS teachers and intervention teams. They have observed an increase in student performance on the i-Ready local assessment, strong CAASPP baseline results, and graduation rates. They have also observed an increase in student participation in interventions and services to support academic achievement.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

## Goals and Actions

### Goal

Goal #	Description
2	We will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Maintain or decrease Chronic Absenteeism rate of .01%	A baseline will be developed from 2020-21 data	Cumulative Enrollment: 521, 8 Chronic Absenteeism Count, Chronic Absenteeism Rate: 1.5%	Cumulative Enrollment: 545, 7 Chronic Absenteeism Count, Chronic Absenteeism Rate: 1.1%	Cumulative Enrollment as of 2/2/2024 - 622	Maintain an Absenteeism Rate of .01% or lower
Strive for 0% Expulsion Rate each year	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate	0% Expulsion Rate	Maintain 0% Expulsion Rate
Strive for 0% Suspension Rate each year	0% Suspension Rate	0% Suspension Rate	0% Suspension Rate	0% Suspension Rate	Maintain 0% Suspension Rate
State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach.	100% of teachers are appropriately credentialed for the courses they teach.	100% of teachers are appropriately credentialed for the courses they teach.	100% of teachers are appropriately credentialed for the courses they teach.	Maintain 100% of teachers are appropriately credentialed for the courses they teach.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24

## Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 2 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

Effectiveness 2.1: Excel Academy focused on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides. Excel Academy is transparent in terms of making sure that parents and guardians are aware of the policies, procedures, and requirements that are in place.

Effectiveness 2.2: Excel Academy recruited and retained highly qualified multiple and single-subject teachers and classified staff, and was able to maintain appropriate assignments and competitive salaries and benefits.

Effectiveness 2.3: Excel Academy provided frequent communication with parents/guardians/students by notifying them of school events, opportunities, and resources through our main communication platform called Beehively, emails, the school website, and social media platforms. Excel Academy built partnerships for student outcomes by sending notification of surveys, parent informational meetings (i.e. ELAC, SSC, and PAC), and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.

Effectiveness 2.4: Excel Academy focused on purchasing technological devices and provided professional development to promote student engagement, support, and access to instruction as needed.



Effectiveness 2.5: Excel Academy focused on providing cultural awareness by inviting students and parents to share about their cultures and traditions during ELAC and SSC meetings which increased meeting attendance and helped to foster cultural awareness. EACS continues to make cultural awareness a priority.

Impact on Student Learning: The increase in attendance and the interventions in place supported progress in both ELA and mathematics as indicated by internal data results.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

## Goals and Actions

### Goal

Goal #	Description
3	We will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2020-2021 Maintain or increase by 2%	Year 1 Outcome - 2021-2022 220 Responses from Educational Partners There were more responses that impacted the overall percentages. With a 96% and 98% approval rate, Excel Academy is excelling in all areas mentioned below.	Year 2 Outcome - 2022-2023 304 Responses from Educational Partners There were more responses that impacted the overall percentages. Excel Academy is excelling in all areas mentioned below.	Year 3 Outcome - 2023-2024 351 Responses from Educational Partners There were more responses that impacted the overall percentages. Excel Academy is excelling in all areas mentioned below, and there was an increase in percentages for several questions.	Maintain or Increase by 2%
State Local Indicator Priority 6: Overall Satisfaction Rate Survey Results Maintain or increase by 2% each year	Overall Satisfaction Report: Based on 66 responses from parents/guardians	Overall Satisfaction Report: Based on 220 responses from parents/guardians	Overall Satisfaction Report: Based on 304 responses from parents/guardians	Overall Satisfaction Report: Based on 351 responses from parents/guardians	Maintain or Increase by 2%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
	<p>97.6% of survey respondents agree that the school has supported students attaining their academic goals.</p> <p>98.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child’s education.</p> <p>98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.</p>	<p>96.4% of survey respondents agree that the school has supported students attaining their academic goals.</p> <p>98.2% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child’s education.</p> <p>98.2% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.</p>	<p>95.7% of survey respondents agree that the school has supported students attaining their academic goals.</p> <p>96.1% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child’s education.</p> <p>98.4% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas.</p>	<p>98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)</p> <p>98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child’s education. (2% increase from 2023)</p> <p>98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)</p>	
<p>Safety Plan Review and Training</p>	<p>Annual Review/Updates and Training Dates</p>	<p>The school safety plan was last reviewed and updated with staff in March of 2022.</p>	<p>The school safety plan was last reviewed and updated with staff in March of 2023.</p>	<p>The school safety plan was last reviewed and updated with staff in March of 2024.</p>	<p>Annual Review and Training Date</p>

## Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 3 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

Effectiveness 3.1: Excel Academy sought out parent input and assessed our level of educational partner engagement through parent participation in Learning Period (LP), ELAC, SSC, and PAC meetings, surveys, Student Council, and SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have had opportunities for participation and input.

Effectiveness 3.2: Excel Academy engaged educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success. EACS built partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.

Effectiveness 3.3: Based on the survey results and stakeholder feedback, Excel Academy successfully built relationships by ensuring that all parents, students, and teachers felt that our school provided a safe, positive, inclusive, and welcoming learning environment.

Effectiveness 3.4: Excel Academy properly vetted all newly hired Content and Community Providers to ensure standards alignment and safety for our students were met at all times.

Effectiveness 3.5: Excel Academy maintains a safe learning environment for all students by training the teachers and staff on school-wide safety plans. The school-wide safety plans are updated as deemed necessary and appropriate and shared with stakeholders to provide transparency and accountability. The safety plan may be viewed upon request. The school safety plan ensures emergency preparedness at learning period meetings, test sites, field trips, staff meetings, and at the school office. It also encompasses required trainings and school

expectations in regards to a mandated reporter, sexual harassment, blood borne pathogens, and active shooters. The expectations of conduct for students, parents, guardians, and staff, bullying and hate crime reporting are also included.

Effectiveness 3.6: Excel Academy notices, reports, statements, or records sent to a student, parent, or guardian were translated as needed and upon request. Documents, records, and statements were sent upon request by clerical staff.

Effectiveness 3.7: Operations of Excel Academy are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.

Impact on Student Learning: Increase in participation on the LCAP feedback survey for all educational partners. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships. EACS recognizes a continued need to increase parent participation in SSC, ELAC and PAC meetings.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**

## Goals and Actions

### Goal

Goal #	Description
4	We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all Educational Partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.

### Measuring and Reporting Results

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for 2023–24
Graduation Rate Dropout Rate	Develop a baseline from 2020-21 data.	2020-21: 93.8% Graduation Rate 2020-21: 6.3% Dropout Rate	2021-22: 100% Graduation Rate 2021-22: 0% Dropout Rate	2022-23 - 90.9% Graduation Rate 2022-23 - 0% Dropout Rate	Increase the graduation rate by 2%
Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU preparedness	2020-21: Number of Students participating in CTE: 11	2021-22: Number of Students participating in CTE: 13	2022-23 - Number of Students participating in CTE: 2	Increase the % of College/Career Prepared students by 2%
Access to a Broad Curriculum: College/Career Prepared  Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	2019-20 Graduates completed all courses for UC/CSU Admission: 0	2020-21: Students enrolled in UC/CSU required courses for admission: 54.43%  Completed All Courses Required for UC/CSU Admission: 0	2021-22: Students enrolled in UC/CSU required courses for admission: 34  Completed All Courses Required for UC/CSU Admission: 0	2022-23: Students enrolled in UC/CSU required courses for admission: 54  Completed All Courses Required for UC/CSU Admission: 5	Increase the A-G course participation and completion annually by 2% to increase the College/Career Prepared Rate

## Goal Analysis

An analysis of how this goal was carried out in the previous year.

A description of any substantive differences in planned actions and actual implementation of these actions.

Through collaborative review of the Goal 4 actions/services there were no substantive differences in planned actions and actual implementation of the actions.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

The budgeted expenditures are a reflection of the projected enrollment.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

Effectiveness 4.1: Consistent with California College and Career Indicators, Excel Academy has developed a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals, and continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.

Effectiveness 4.2: Students transitioning from middle to high school are monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.

Effectiveness 4.3: Excel Academy provides high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Excel Academy works to review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.

Effectiveness 4.4: Excel Academy ensures all students have the opportunity for intensive CAASPP preparation, specifically low income, EL students, foster-youth, and students with disabilities. Grade level test prep packets in ELA and math, the teacher led performance test prep sessions, and practice tests are designed to assist students in preparation for testing.

Effectiveness 4.5: Excel Academy covers the Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.

Effectiveness 4.6: Excel Academy is working to expand A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.

Effectiveness 4.7: Excel Academy analyzes 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Excel Academy provides targeted interventions and resources to students identified as needing additional support.

Impact on Student Learning: Excel Academy removed barriers such as Advanced Placement exam costs for low income and foster-youth students experiencing financial hardship, and observed greater student interest in Advanced Placement (AP), CTE, and A-G courses. The continued goal is to increase enrollment in these courses.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

No changes to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice were made.

**A report of the Total Estimated Actual Expenditures for last year's actions may be found in the Annual Update Table. A report of the Estimated Actual Percentages of Improved Services for last year's actions may be found in the Contributing Actions Annual Update Table.**



## Instructions

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education’s (CDE’s) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [lcff@cde.ca.gov](mailto:lcff@cde.ca.gov).

Complete the prompts as instructed for each goal included in the 2023–24 LCAP. Duplicate the tables as needed. The 2023–24 LCAP Annual Update must be included with the 2024–25 LCAP.

## Goals and Actions

### Goal(s)

#### Description:

Copy and paste verbatim from the 2023–24 LCAP.

#### Measuring and Reporting Results

- Copy and paste verbatim from the 2023–24 LCAP.

#### Metric:

- Copy and paste verbatim from the 2023–24 LCAP.

#### Baseline:

- Copy and paste verbatim from the 2023–24 LCAP.

#### Year 1 Outcome:

- Copy and paste verbatim from the 2023–24 LCAP.

#### Year 2 Outcome:

- Copy and paste verbatim from the 2023–24 LCAP.

#### Year 3 Outcome:

- When completing the 2023–24 LCAP Annual Update, enter the most recent data available. Indicate the school year to which the data applies.

#### Desired Outcome for 2023–24:

- Copy and paste verbatim from the 2023–24 LCAP.

Timeline for completing the “**Measuring and Reporting Results**” part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Year 3 Outcome	Desired Outcome for Year 3 (2023–24)
Copy and paste verbatim from the 2023–24 LCAP.	Copy and paste verbatim from the 2023–24 LCAP.	Copy and paste verbatim from the 2023–24 LCAP.	Copy and paste verbatim from the 2023–24 LCAP.	Enter information in this box when completing the 2023–24 LCAP Annual Update.	Copy and paste verbatim from the 2023–24 LCAP.

## Goal Analysis

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective in achieving the goal. Respond to the prompts as instructed.

A description of any substantive differences in planned actions and actual implementation of these actions.

- Describe the overall implementation of the actions to achieve the articulated goal. Include a discussion of relevant challenges and successes experienced with the implementation process. This must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

An explanation of how effective or ineffective the specific actions were in making progress toward the goal during the three-year LCAP cycle.

- Describe the effectiveness or ineffectiveness of the specific actions in making progress toward the goal during the three-year LCAP cycle. “Effectiveness” means the degree to which the actions were successful in producing the desired result and “ineffectiveness” means that the actions did not produce any significant or desired result.
  - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
  - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
  - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, desired outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
  - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:
    - The reasons for the ineffectiveness, and
    - How changes to the action will result in a new or strengthened approach.

California Department of Education  
November 2023



# EXCEL ACADEMY CHARTER SCHOOL

*2024-2025 Local Indicators and  
Local Control and Accountability Plan (LCAP)*

# About the Local Indicators

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



- LEAs are required to annually complete the California Dashboard self-reflection report.
- The State Board of Education adopted performance standards that require LEAs to annually measure its progress.
- The CA Dashboard Local Indicator Report was completed for submission and reviewed by the Executive Director. The Local Indicators will be shared with the Board of Directors along with the LCAP in June.



## Teacher Assignment

- There are no mis-assignments of teachers of English Learners, and there are no vacant teacher positions.
- All students have access to standards-aligned instructional curriculum and materials.



## Academic Standards and Curriculum

- EACS reports *Full Implementation* in Next Generation Science Standards (NGSS) and *Full Implementation and Sustainability* in math, English Language Arts (ELA), English Language Development (ELD), social science, Career Technical Education (CTE), health and physical education, visual and performing arts, and world language.



## Support for Educational Partners

- EACS reports *Full Implementation and Sustainability* in professional development, making instructional materials aligned to standards for all students, supporting staff and areas for improvement, academic standards adopted by the State Board of Education for all students, creating a welcoming environment for all families in the community, strong, consistent communication, and strong, consistent communication with educational partners.



# Educational Partner Engagement

*Excel Academy collaborates with educational partners to gather input on the LCAP and implement best practices for serving all student groups.*

- Administrative department, and staff meetings - review of the schoolwide goals, best practices, and strategic planning
- Personal Learning Communities (PLC) Meetings - Improve student learner outcomes
- Surveys to stakeholders - results analyzed and shared
- ELAC: 9/6/2023, 11/1/2023, 1/31/2024, 5/22/2024
- SSC: 9/7/2023, 11/2/2023, 2/1/2024, 5/23/2024
- PAC: 2/26/2024
- SELPA Approval - June 2024
- School Board LCAP Draft Public Hearing: 6/13/2024
- School Board LCAP Adoption Public Meeting: 6/20/2024

# LCAP

EACS has established:

- Four goals
- Actions aligned to each goal
- Measuring and reporting metrics
- Analysis of the effectiveness of each action

LCAP process serves three distinct functions:

- Comprehensive Strategic Planning
- Meaningful Engagement of Educational Partners
- Accountability and Compliance



# Additional Requirements of the LCAP

**In depth analysis of annual performance based on the CA Dashboard**

**Engaging Educational Partners**

- A. Process of Engagement
- B. Descriptions of how the LCAP was influenced by educational partner feedback

**Increased or improved services for Foster Youth, English Learners (including LTEL students), and Low Income Students**

- A. Identified Need and Action
- B. How and why the action is addressed
- C. Metrics to Monitor Effectiveness

**Limited Actions**

- A. Identified Need and Action
- B. How and why the action is addressed
- C. Metrics to Monitor Effectiveness



## Celebrations of Annual Performance

*Reflections are based on the CA Dashboard and local data analysis*

Exceeded participation requirement for the CAASPP

EACS students outscored the state and county percentages

Community Events

All Staff Professional Development

Parent Summit, Parent Power-Up, Webinars, Parent Training

School Climate - Survey Results

EL live instruction, GATE, WIN Interventions

Additional High School Course Offerings



# Educational Partner Feedback



# Educational Partner Feedback

*Students in grades 6-12*

98%

Agree that the ToR is available to speak with them when they need guidance.

95%

Agree that the curriculum provides challenging grade level instruction and assessment of their academic progress.

***"Excel already is helping me learn better and I feel as if my learning goals are already fulfilled."  
- Excel Student***

96.7%

Agree that the ToR cares about their education and is committed to helping them succeed.

93.5%

Agree that the curriculum and instruction are engaging and they are able to complete the coursework on time.

96.7%

Feel overall satisfaction with Excel Academy Charter School.

95.9%

Feel safe and welcome to meet with their teacher to discuss their progress

***"My learning goals are met."  
- Excel Student***

95.1%

Feel the school does a good job communicating through all forms of communication.

94.3%

Know that they have someone at school who they can talk to (teacher or counselor).



# GOAL 1



*Excel Academy will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.*

# ***Goal 1 - Broad Goal - Focus on Student Achievement***

## **Aligned with State Priorities:**

- Priority 1 - Basic Conditions of Learning: Qualified and Effective Teachers, Teacher Credentialing
- Priority 2 - State Standards and access to curriculum aligned instructional materials
- Priority 4 - Pupil Achievement/Outcomes
- Priority 7 - Course Access - Availability of textbooks and other instructional materials

## **Measuring and Reporting Results:**

- CAASPP, i-Ready, and ELPAC Data

# Goal 1 - Effectiveness

## All eight actions were determined effective

- |   |  |  |
|---|--|--|
| <ul style="list-style-type: none"><li>■ Students have benefited academically from the increase of support provided by EACS teachers and intervention teams.</li></ul> | <ul style="list-style-type: none"><li>■ Increase in student performance on the i-Ready local assessment, strong CAASPP baseline results, and graduation rates.</li></ul> | <ul style="list-style-type: none"><li>■ Increase in student participation in interventions and services to support academic achievement.</li></ul> |
|---|--|--|



## GOAL 2



We will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.

## ***Goal 2 - Maintenance Goal that includes actions that are ongoing and focused on regular attendance and student achievement***

### **Aligned with State Priorities:**

- Priority 1 - Basic Conditions of Learning, Qualified and Effective Teachers
- Priority 2 - State Standards and access to curriculum aligned instructional materials
- Priority 3 - Parental Involvement and Engagement
- Priority 4 - Pupil Achievement: equity in education, assessment, curriculum and instruction
- Priority 5 - Pupil Engagement - attendance

### **Measuring and Reporting Results:**

- Maintain or decrease Chronic Absenteeism
- Strive for 0% Expulsion and Suspension Rates
- 100% Qualified and Effective Teachers



# Goal 2 - Effectiveness

## All eight actions were determined effective

- Increase in student attendance

- Increase of student participation in SEL lessons, ELD Live, and WIN intervention classes.

*Attendance and the interventions in place supported progress in both ELA and mathematics as indicated by internal data results.*

# GOAL 3

*We will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all Educational Partners opportunities for input in decision making for policy and program improvement.*

## ***Goal 3 - Maintenance goal that focuses on the correlation between establishing connections and partnerships in education with school attendance and student success.***

### **Aligned with State Priorities:**

- Priority 3 - Parental Involvement - Engagement Educational -
- Effort to seek input and participation
- Priority 5 - Pupil Engagement: School attendance rates
- Priority 6 - School Climate: Sense of safety and connectedness

### **Measuring and Reporting Results:**

- Participation/Input Survey Results
- Maintain or increase survey outcomes by 2% each year
- Annual safety review/updates and training

# Goal 3 - Effectiveness

## All seven actions were determined effective

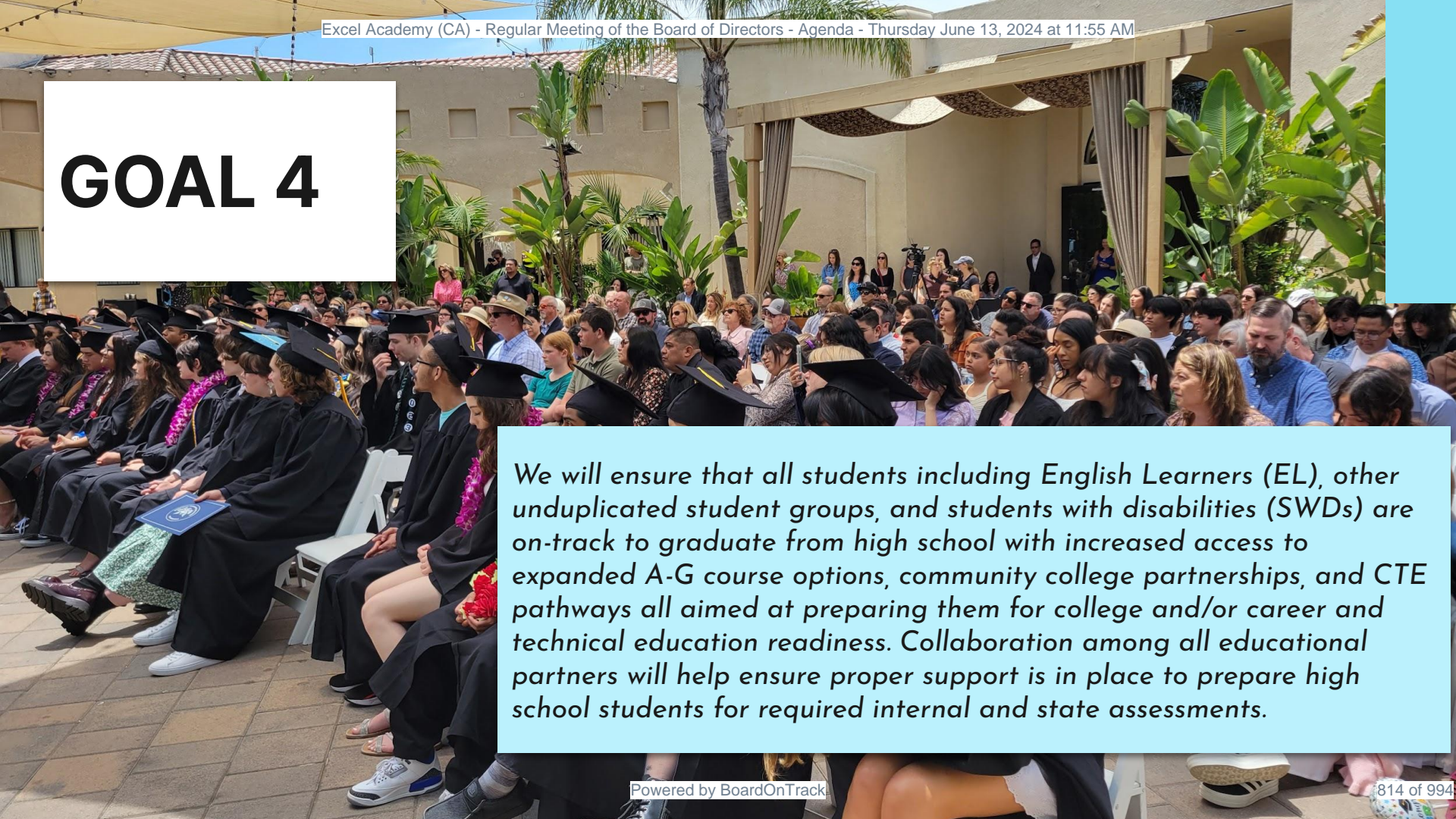
- Increase in participation on the LCAP feedback survey for all stakeholders

- Increased the number and of input survey participants provides an opportunity to develop collaborative relationships with students, parents, and the community.

*EACS recognizes a continued need to increase parent participation in SSC, ELAC and the PAC meetings.*



# GOAL 4



*We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all educational partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.*

***Goal 4 - This goal supports students in achieving high school graduation and being ready for college and careers by continually monitoring graduation rates, CTE participation, student data, and interventions.***

**Aligned with State Priorities:**

- Priority 1 - Basics Conditions of Learning - Qualified/Effective Teachers
- Priority 2 - State Standards: State adopted academic content
- Priority 4 - Pupil Achievement
- Priority 5 - Pupil Engagement - School attendance and chronic absenteeism
- Priority 7 - Course Access
- Priority 8 - Pupil Outcomes

**Measuring and Reporting Results:**

- Graduation and Dropout Rate
- Access to Broad Curriculum: Career Technical Education (CTE) Participation and College/Career Preparedness
- Students enrolled in and completion of A-G courses required for UC/CSU Admission

# Goal 4 - Effectiveness

## All seven actions were determined effective

- Increased enrollment in A-G and CTE courses

- Excel Academy removed barriers such as Advanced Placement exam costs for low income and foster-youth students experiencing financial hardship, and observed greater student interest in Advanced Placement (AP), CTE, and A-G courses.

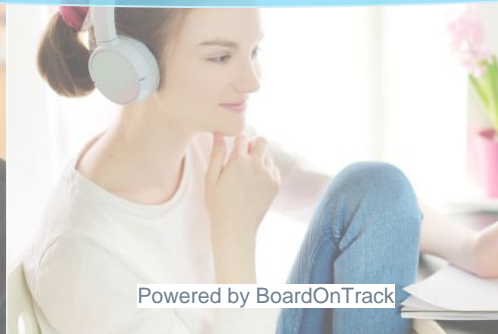
*The continued goal is to increase enrollment in these courses.*





THANK YOU!

*Excel Academy...  
where we instill a love for learning  
in each individual student.*







## PUBLIC HEARING NOTICE

Notice is hereby given that the Board of Directors of Excel Academy Charter Schools will hold its Regular Board Meeting on Thursday, June 13, 2024, to hear public comments regarding the 2024-2025 Local Control and Accountability Plans (LCAP) for Excel Academy Charter Schools and 2024-2025 Proposed July Budget.

The 2024-2025 Local Control Accountability Plans (LCAP) are available for review on the Excel Academy Charter Schools website.

The 2024-2025 Proposed July Budget is available for review on the Excel Academy Charter Schools website.

# Coversheet

## Proposed Budget 2024-2025

**Section:** XII. Public Hearing  
**Item:** B. Proposed Budget 2024-2025  
**Purpose:** Discuss

**Submitted by:**

**Related Material:**

24-06-13 FY24-25 Budget Adoption.pptx.pdf

Final FY24-25 Adopted Budget Warner.pdf

Final FY24-25 Adopted Budget Helendalened - Helendale MYP.pdf

Final FY24-25 Adopted Budget Combined - FY24 FIB Combined .pdf

2024\_Local\_Control\_and\_Accountability\_Plan\_Excel\_Academy\_Charter\_School\_-\_Warner\_20240529 FINAL.pdf

2024\_Local\_Control\_and\_Accountability\_Plan\_Excel\_Academy\_Charter\_School\_-\_Helendale\_20240529 FINAL.pdf

Helendale - FY24-25 Mullti Year EPA Expenditure Plan.pdf

Helendale - FY24-25 EPA Expenditure Plan .pdf

Helendale FY 22-23 EPA Actuals .docx.pdf

Warner - FY24-25 Mullti Year EPA Expenditure Plan.pdf

Warner - FY24-25 EPA Expenditure Plan .pdf

Warner FY 22-23 EPA Actuals .docx.pdf






# Excel Academy Charter Schools

## FY 2024-25 Proposed Budget June 13, 2024



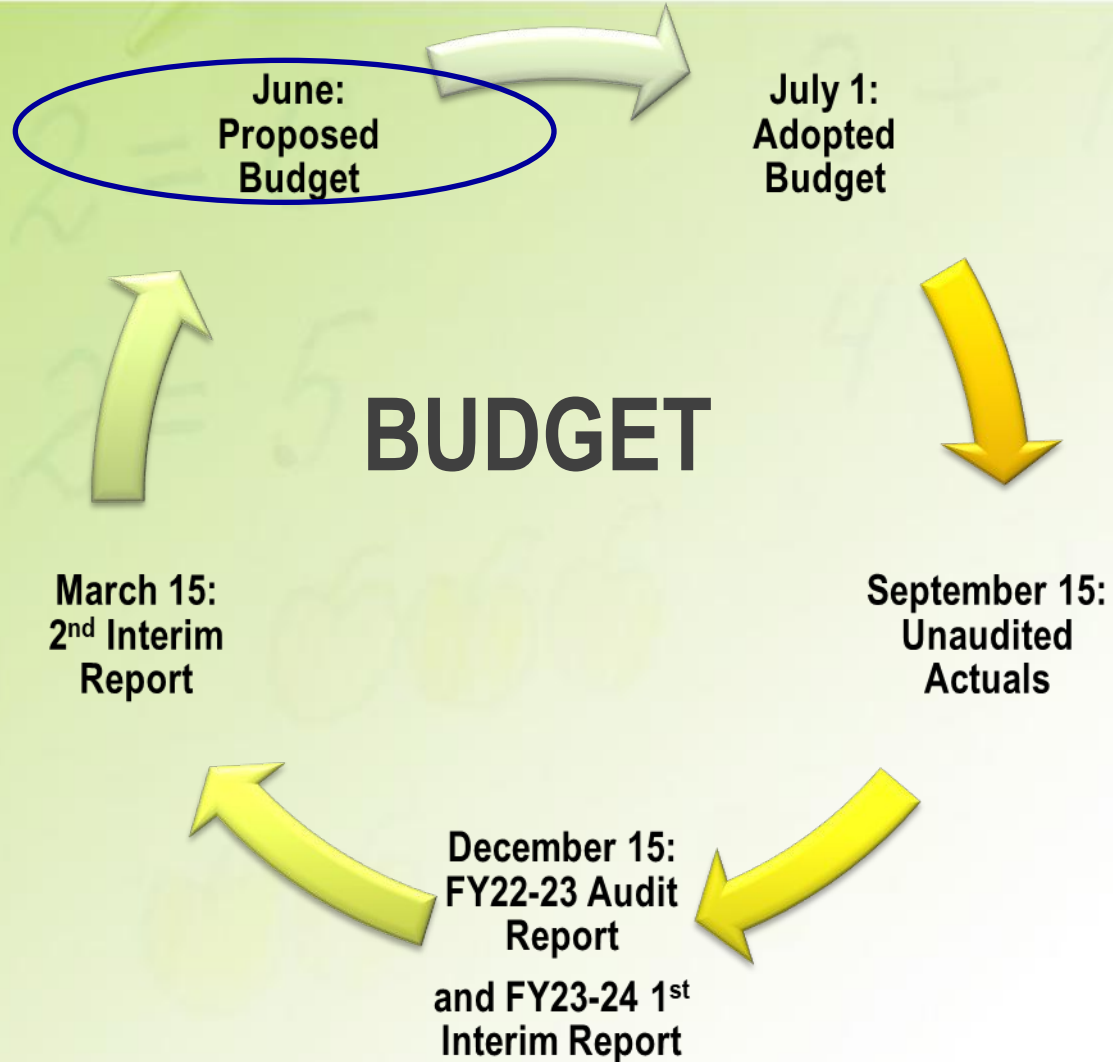


# Presentation Overview

-  **Budget Cycle**
-  **Budget Assumptions**
-  **CalSTRS Analysis**
-  **Multi year Projection**
-  **Next Steps**



# The Budget Cycle



# Budgetary Building Blocks



- **Revenues:**

- ◆ **COLA – Increase**

- ◆ FY2024-25 – 1.07%
- ◆ FY2024-25 – 0.00%
- ◆ FY2025-26 – 0.00%
- ◆ Projected ADA FY24-25 – 1,644
- ◆ Enrollment Increase Projection – 1.0%
- ◆ Attendance Rate (ADA) – 98%

- **Expenditures:**

- ◆ **Step and Column Increase –**

- ◆ FY2024-25 - 3%
- ◆ FY2025-26 – 0%
- ◆ FY2026-27 – 0%
- ◆ **STRS Contribution Increase – 19.10%**



# 2024-25 LCFF Funding Factors



\$183,736

Grade Span	TK-3	4-6	7-8	9-12
2023-24 Base Grant per ADA	\$9,919	\$10,069	\$10,367	\$12,015
<b>1.07% COLA</b>	<b>\$106</b>	<b>\$108</b>	<b>\$111</b>	<b>\$129</b>
2024-25 Base Grant per ADA	\$10,025	\$10,177	\$10,478	\$12,144
GSA	\$1,043	–	–	\$316
2024-25 Adjusted Base Grant per ADA	\$11,068	\$10,177	\$10,478	\$12,460
20% Supplemental Grant per ADA <sup>1</sup>	\$2,214	\$2,035	\$2,096	\$2,492
65% Concentration Grant per ADA <sup>2</sup>	\$3,237	\$2,977	\$3,065	\$3,645
<b>TK Add-On (inclusive of COLA)</b>	<b>\$3,077</b>	–	–	–

<sup>1</sup>Maximum amount per ADA—to arrive at LEA’s grant amount, multiply adjusted base grant per ADA by 20% and UPP

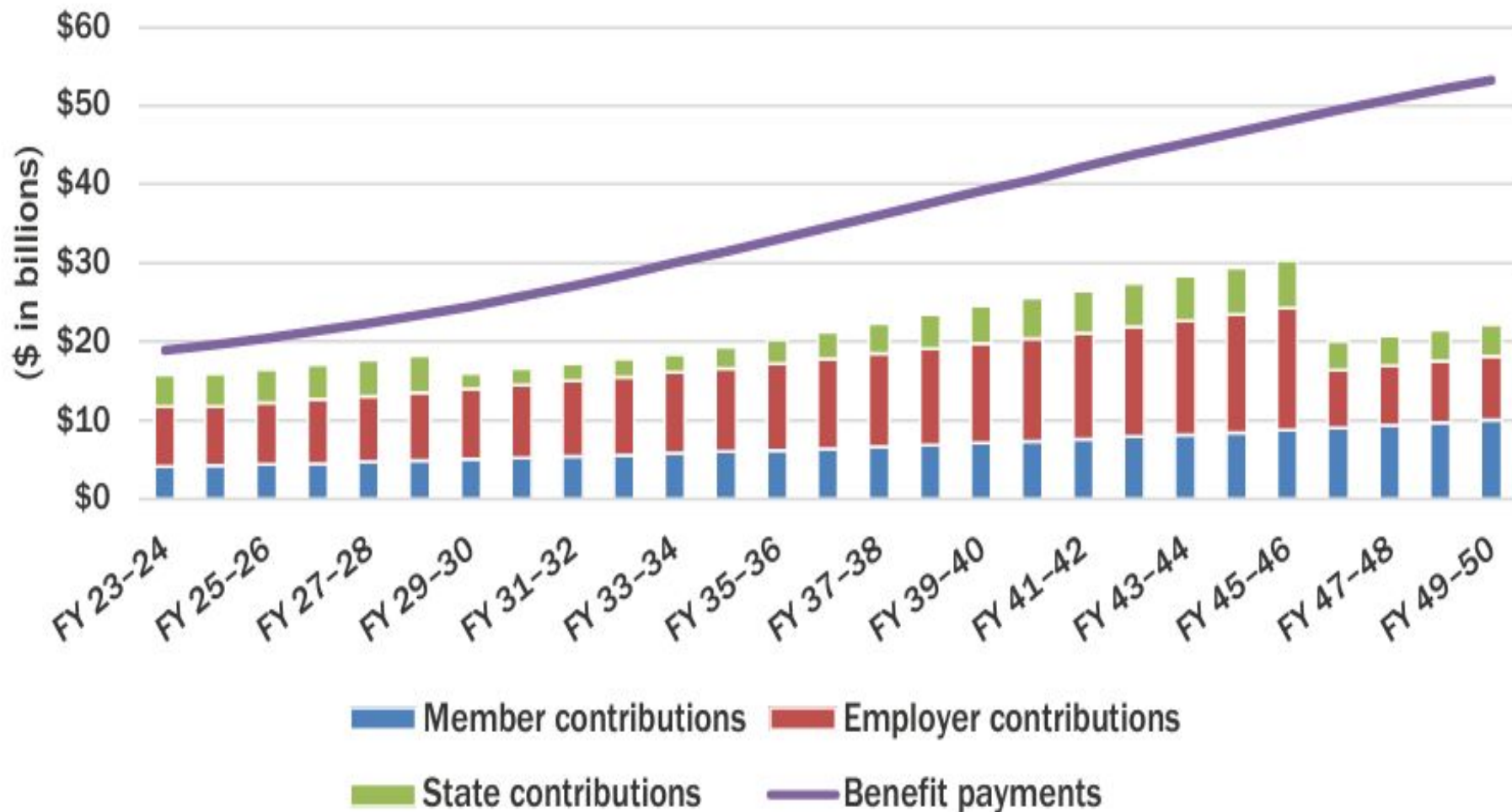
<sup>2</sup>Maximum amount per ADA—to arrive at LEA’s grant amount, multiply adjusted base grant per ADA by 65% and UPP above 55%





# CalSTRS Projected Cash Flows

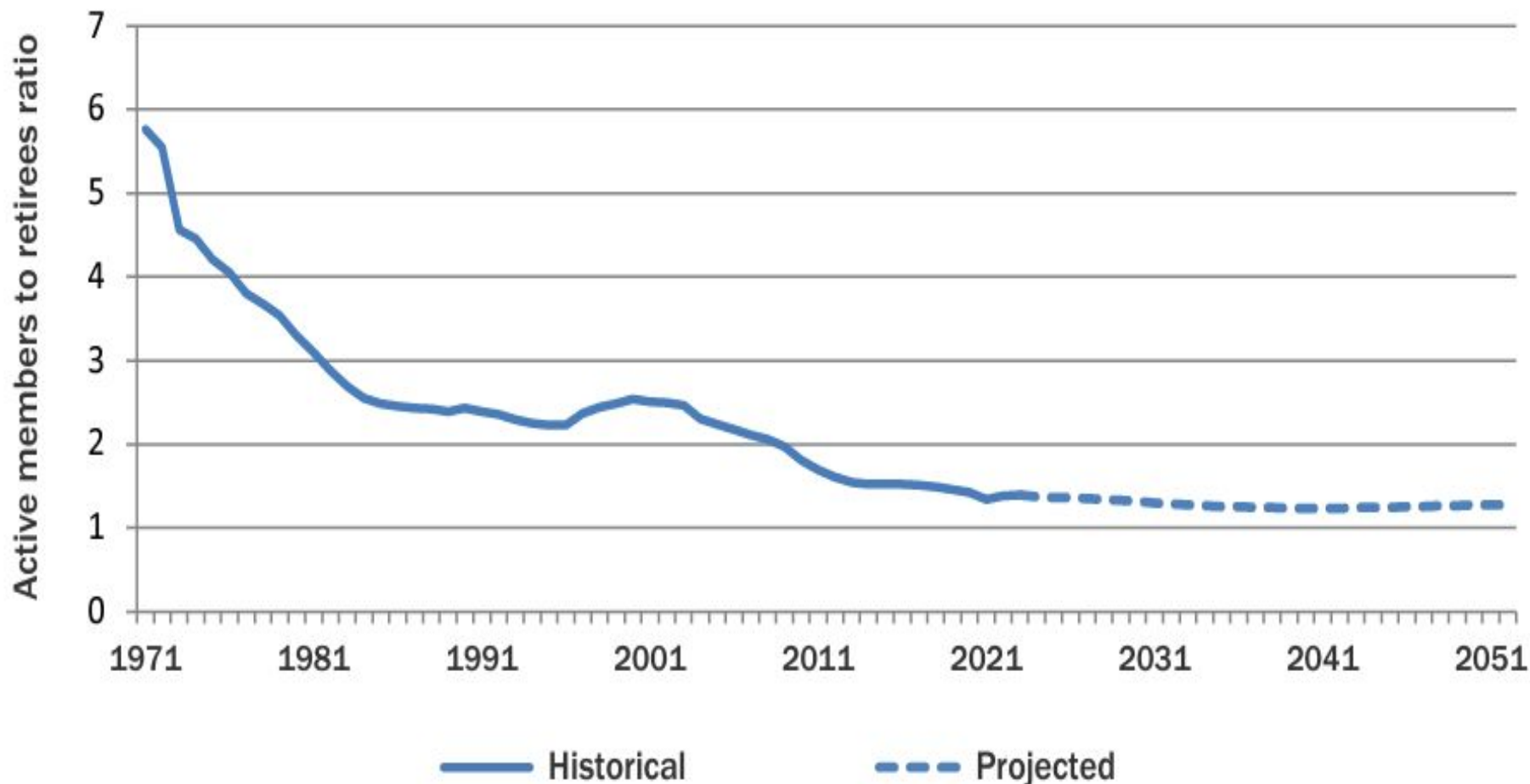
Projected cash flows for the Defined Benefit Program



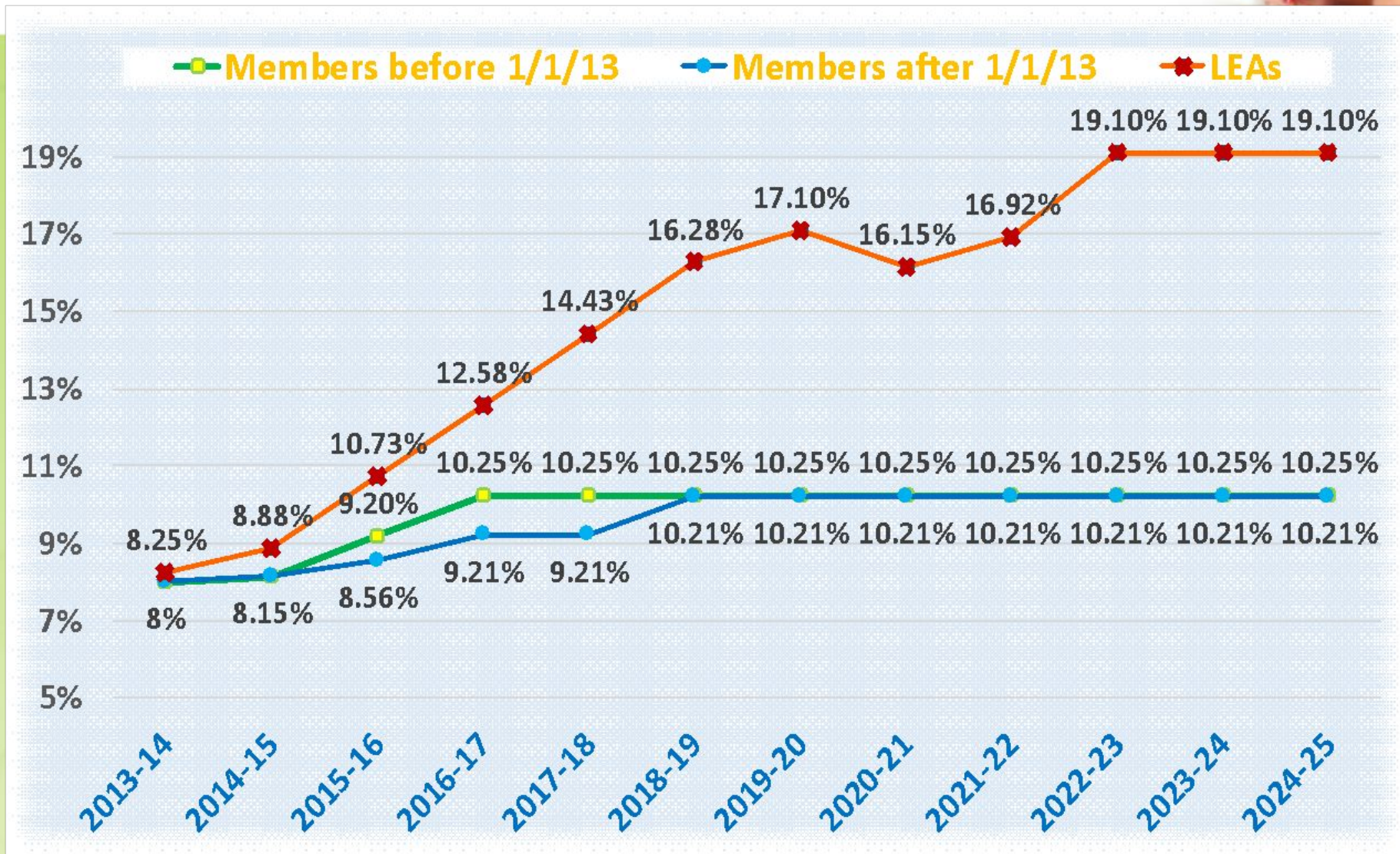


# Active to Retired Members Ratio

## CalSTRS ratio of active to retired members



# Contribution Rates to CalSTRS





# Combined Multi-Year Projections (FY2024-25 Proposed Budget)



	2024-25	2025-26	2026-27
<b>Total Revenues</b>	<b>23,953,509</b>	<b>24,160,342</b>	<b>24,401,945</b>
<b>Total Expenditures</b>	<b>23,882,915</b>	<b>23,970,870</b>	<b>24,059,705</b>
<b>Projected Increase in Fund Balance</b>	<b>70,594</b>	<b>189,472</b>	<b>342,239</b>
<b>Projected Beginning Balance</b>	<b>8,148,214</b>	<b>8,218,808</b>	<b>8,408,280</b>
<b>Projected Ending Balance</b>	<b>8,218,808</b>	<b>8,408,280</b>	<b>8,750,519</b>
<b>Adjustments to Ending Fund Balance</b>			
<b>Restricted Carryover Balances</b>			
<b>15% Required for Economic Uncertainties</b>	<b>3,582,437</b>	<b>3,595,630</b>	<b>3,608,955</b>
<b>Unappropriated Fund Balance Above 15%</b>	<b>4,636,371</b>	<b>4,812,650</b>	<b>5,141,564</b>
<b>Ending Balance Percent Of Expenditures</b>	<b>34.41%</b>	<b>35.07%</b>	<b>36.37%</b>

# Next Steps



- **EACS**

- **FY 2023-24 Budget and LCAP Adoption – June 20, 2024**
- **FY 2023-24 Unaudited Actuals – September 15, 2024**
- **FY 2024-25 First Interim Budget – December 15, 2024**

- **State Level**

- **FY 2024-25 State Budget Adoption – June 30, 2024**

Description - Warner	FY2024-25 Warner Unrestricted	FY2024-25 Warner Restricted	FY2024-25 Warner Combined	FY2025-26 Warner Unrestricted	FY2025-26 Warner Restricted	FY2025-26 Warner Combined	FY2026-27 Warner Unrestricted	FY2026-27 Warner Restricted	FY2026-27 Warner Combined
Average Daily Attendance (P-2 Projected)			1,003.00			1,013.03			1,023.16
COLA			1.07%%			0.00%			0.00%
<b>REVENUES:</b>									
<b>General Purpose Entitlement</b>									
8011 General Purpose Block Grant	11,038,969	0	11,038,969	11,186,105	0	11,186,105	11,305,798	0	11,305,798
8012 Education Protection Account	200,600	0	200,600	202,606	0	202,606	204,632	0	204,632
8096 Funding in Lieu of Property Taxes	783,138	0	783,138	783,138	0	783,138	783,138	0	783,138
<b>TTL General Purpose Entitlement</b>	<b>12,022,707</b>	<b>0</b>	<b>12,022,707</b>	<b>12,171,849</b>	<b>0</b>	<b>12,171,849</b>	<b>12,293,568</b>	<b>0</b>	<b>12,293,568</b>
<b>Federal Revenue</b>									
8181 Federal IDEA SpEd Revenue	0	176,996	176,996	0	178,341	178,341	0	180,125	180,125
8290 Other Federal Revenue	0	163,257	163,257	0	164,498	164,498	0	166,143	166,143
<b>TTL Federal Revenue</b>	<b>0</b>	<b>340,253</b>	<b>340,253</b>	<b>0</b>	<b>342,839</b>	<b>342,839</b>	<b>0</b>	<b>346,267</b>	<b>346,267</b>
<b>Other State Revenue</b>									
8311 AB602 State SpEd Revenue	0	1,027,382	1,027,382	0	1,035,190	1,035,190	0	1,045,542	1,045,542
8550 Mandated Cost Reimbursements	31,828	0	31,828	32,070	0	32,070	32,390	0	32,390
8560 State Lottery Revenue	183,376	301,257	484,633	184,769	303,547	488,316	186,617	306,582	493,199
8590 Other State Revenue	0	684,500	684,500	0	689,702	689,702	0	696,599	696,599
<b>TTL Other State Revenue</b>	<b>215,203</b>	<b>2,013,139</b>	<b>2,228,342</b>	<b>216,839</b>	<b>2,028,439</b>	<b>2,245,278</b>	<b>219,007</b>	<b>2,048,723</b>	<b>2,267,730</b>
<b>Other Local Revenue</b>									
8660 Interest Income	124,000	0	124,000	124,942	0	124,942	126,192	0	126,192
8699 Other Revenue	0	0	0	0	0	0	0	0	0
8980 Contributions to Restricted Programs	-603,857	603,857	0	-591,633	591,633	0	-573,639	573,639	0
<b>TTL Other Local Revenue</b>	<b>-479,857</b>	<b>603,857</b>	<b>124,000</b>	<b>-466,691</b>	<b>591,633</b>	<b>124,942</b>	<b>-447,447</b>	<b>573,639</b>	<b>126,192</b>
<b>TTL REVENUES</b>	<b>11,758,053</b>	<b>2,957,249</b>	<b>14,715,302</b>	<b>11,921,997</b>	<b>2,962,911</b>	<b>14,884,908</b>	<b>12,065,128</b>	<b>2,968,630</b>	<b>15,033,758</b>
<b>EXPENDITURES:</b>									
<b>1000 - Certificated Salaries</b>									
1100 Teacher Compensation	3,630,566	712,317	4,342,883	3,630,566	712,317	4,342,883	3,630,566	712,317	4,342,883
1200 Student Support	227,957	394,756	622,713	227,957	394,756	622,713	227,957	394,756	622,713
1300 Certificated Administrators	658,600	331,628	990,228	658,600	331,628	990,228	658,600	331,628	990,228
1900 Other Certificated Salaries	0	0	0	0	0	0	0	0	0
<b>TTL Certificated Salaries</b>	<b>4,517,123</b>	<b>1,438,701</b>	<b>5,955,824</b>	<b>4,517,123</b>	<b>1,438,701</b>	<b>5,955,824</b>	<b>4,517,123</b>	<b>1,438,701</b>	<b>5,955,824</b>
<b>2000 - Non - Certificated Salaries</b>									
2100 Instructional Aides	0	99,318	99,318	0	99,318	99,318	0	99,318	99,318
2300 Classified Administrators	353,986	0	353,986	353,986	0	353,986	353,986	0	353,986
2400 Clerical & Technical Staff	470,684	43,098	513,782	470,684	43,098	513,782	470,684	43,098	513,782
<b>TTL Non - Certificated Salaries</b>	<b>824,670</b>	<b>142,416</b>	<b>967,086</b>	<b>824,670</b>	<b>142,416</b>	<b>967,086</b>	<b>824,670</b>	<b>142,416</b>	<b>967,086</b>
<b>3000 - Employee Benefits</b>									
3101 STRS Certificated	579,576	526,305	1,105,881	579,576	526,305	1,105,881	579,576	526,305	1,105,881
3300 OASDI/Medicare	133,034	32,172	165,206	133,034	32,172	165,206	133,034	32,172	165,206
3400 Health and Welfare	623,844	184,202	808,046	623,844	184,202	808,046	623,844	184,202	808,046
3500 Unemployment Insurance	11,877	14,868	26,745	11,877	14,868	26,745	11,877	14,868	26,745





Description - Helendale	FY2024-25 Helendale Unrestricted	FY2024-25 Helendale Restricted	FY2024-25 Helendale Combined	FY2025-26 Helendale Unrestricted	FY2025-26 Helendale Restricted	FY2025-26 Helendale Combined	FY2026-27 Helendale Unrestricted	FY2026-27 Helendale Restricted	FY2026-27 Helendale Combined
<b>Projected P-2 ADA</b>			<b>641.00</b>			<b>647.41</b>			<b>653.88</b>
<b>COLA</b>			<b>1.07%</b>			<b>0.00%</b>			<b>0.00%</b>
<b>REVENUES:</b>									
<b>General Purpose Entitlement</b>									
8011 General Purpose Block Grant	7,541,530	0	7,541,530	7,563,792	0	7,563,792	7,640,670	0	7,640,670
8012 Education Protection Account	128,200	0	128,200	129,482	0	129,482	130,777	0	130,777
8096 Funding in Lieu of Property Taxes	124,172	0	124,172	124,172	0	124,172	124,172	0	124,172
<b>TTL General Purpose Entitlement</b>	<b>7,793,902</b>	<b>0</b>	<b>7,793,902</b>	<b>7,817,446</b>	<b>0</b>	<b>7,817,446</b>	<b>7,895,619</b>	<b>0</b>	<b>7,895,619</b>
<b>Federal Revenue</b>									
8181 Federal IDEA SpEd Revenue	0	86,880	86,880	0	87,749	87,749	0	88,626	88,626
8290 Other Federal Revenue	0	106,672	106,672	0	107,739	107,739	0	108,816	108,816
<b>TTL Federal Revenue</b>	<b>0</b>	<b>193,552</b>	<b>193,552</b>	<b>0</b>	<b>195,488</b>	<b>195,488</b>	<b>0</b>	<b>197,442</b>	<b>197,442</b>
<b>Other State Revenue</b>									
8311 AB602 State SpEd Revenue	0	504,300	504,300	0	509,343	509,343	0	514,436	514,436
8550 Mandated Cost Reimbursements	19,508	0	19,508	19,657	0	19,657	19,853	0	19,853
8560 State Lottery Revenue	112,391	184,642	297,033	113,246	186,045	299,291	114,378	187,906	302,284
8590 Other State Revenue	0	353,911	353,911	0	357,450	357,450	0	361,025	361,025
<b>TTL Other State Revenue</b>	<b>131,900</b>	<b>1,042,853</b>	<b>1,174,753</b>	<b>132,902</b>	<b>1,052,838</b>	<b>1,185,741</b>	<b>134,231</b>	<b>1,063,367</b>	<b>1,197,598</b>
<b>Other Local Revenue</b>									
8660 Interest Income	76,000	0	76,000	76,760	0	76,760	77,528	0	77,528
8699 Other Revenue	0	0	0	0	0	0	0	0	0
8980 Contributions to Restricted Programs	-385,672	385,672	0	-376,073	376,073	0	-365,934	365,934	0
<b>TTL Other Local Revenue</b>	<b>-309,672</b>	<b>385,672</b>	<b>76,000</b>	<b>-299,313</b>	<b>376,073</b>	<b>76,760</b>	<b>-288,406</b>	<b>365,934</b>	<b>77,528</b>
<b>TTL REVENUES</b>	<b>7,616,130</b>	<b>1,622,077</b>	<b>9,238,207</b>	<b>7,651,035</b>	<b>1,624,399</b>	<b>9,275,434</b>	<b>7,741,444</b>	<b>1,626,743</b>	<b>9,368,187</b>
<b>EXPENDITURES:</b>									
<b>1000 - Certificated Salaries</b>		0	0						
1100 Teacher Compensation	2,225,186	418,122	2,643,308	2,225,186	418,122	2,643,308	2,225,186	418,122	2,643,308
1200 Student Support	212,969	235,483	448,452	212,969	235,483	448,452	212,969	235,483	448,452
1300 Certificated Administrators	432,444	201,890	634,334	432,444	201,890	634,334	432,444	201,890	634,334
1900 Other Certificated Salaries	0	0	0	0	0	0	0	0	0
<b>TTL Certificated Salaries</b>	<b>2,870,599</b>	<b>855,495</b>	<b>3,726,094</b>	<b>2,870,599</b>	<b>855,495</b>	<b>3,726,094</b>	<b>2,870,599</b>	<b>855,495</b>	<b>3,726,094</b>
<b>2000 - Non - Certificated Salaries</b>		0	0						
2100 Instructional Aides	0	60,872	60,872	0	60,872	60,872	0	60,872	60,872
2300 Classified Administrators	216,959	0	216,959	216,959	0	216,959	216,959	0	216,959
2400 Clerical & Technical Staff	288,484	26,414	314,898	288,484	26,414	314,898	288,484	26,414	314,898
<b>TTL Non - Certificated Salaries</b>	<b>505,443</b>	<b>87,286</b>	<b>592,729</b>	<b>505,443</b>	<b>87,286</b>	<b>592,729</b>	<b>505,443</b>	<b>87,286</b>	<b>592,729</b>
<b>3000 - Employee Benefits</b>		0	0						
3101 STRS Certificated	546,869	281,603	828,472	546,869	281,603	828,472	546,869	281,603	828,472
3300 OASDI/Medicare	81,537	19,337	100,874	81,537	19,337	100,874	81,537	19,337	100,874

3400 Health and Welfare	382,356	110,175	492,531	382,356	110,175	492,531	382,356	110,175	492,531
3500 Unemployment Insurance	7,279	8,597	15,876	7,279	8,597	15,876	7,279	8,597	15,876
3600 Workers' Comp Certificated	16,571	4,599	21,170	16,571	4,599	21,170	16,571	4,599	21,170
3901 Other Benefits	67,866	22,825	90,691	67,866	22,825	90,691	67,866	22,825	90,691
<b>TTL Employee Benefits</b>	<b>1,102,478</b>	<b>447,136</b>	<b>1,549,614</b>	<b>1,102,478</b>	<b>447,136</b>	<b>1,549,614</b>	<b>1,102,478</b>	<b>447,136</b>	<b>1,549,614</b>
<b>4000 - Books/Supplies/Materials</b>									
4100 Textbooks & Core Curriculum	646,311	61,112	707,423	652,774	61,723	714,497	659,302	62,340	721,642
4300 Materials & Supplies	16,034	59,669	75,703	16,194	60,266	76,460	16,356	60,868	77,225
4310 Instructional Materials	618,340	0	618,340	624,524	0	624,524	630,769	0	630,769
4320 Office Supplies	0	0	0	0	0	0	0	0	0
4330 Meals & Events	0	0	0	0	0	0	0	0	0
4350 Other Supplies - Materials & Supplies	41,040	0	41,040	41,450	0	41,450	41,865	0	41,865
4400 Non - Capitalized Equipment - Staff	0	0	0	0	0	0	0	0	0
<b>TTL Books/Supplies/Materials</b>	<b>1,321,726</b>	<b>120,781</b>	<b>1,442,507</b>	<b>1,334,943</b>	<b>121,989</b>	<b>1,456,932</b>	<b>1,348,292</b>	<b>123,209</b>	<b>1,471,501</b>
<b>5000 - Services &amp; Operations</b>									
5100 Subagreements For Services	0	25,431	25,431	0	25,685	25,685	0	25,942	25,942
5200 Travel & Conferences	2,660	32,870	35,530	2,687	33,199	35,885	2,713	33,531	36,244
5210 Mileage Reimbursements	0	0	0	0	0	0	0	0	0
5300 Dues & Memberships	4,590	21,660	26,250	4,636	21,877	26,513	4,683	22,095	26,778
5400 Insurance	48,676	0	48,676	49,163	0	49,163	49,655	0	49,655
5610 Facility Rents & Leases	41,453	0	41,453	41,868	0	41,868	42,287	0	42,287
5800 Professional Services - Non - instructional	30,400	24,264	54,664	30,704	24,507	55,211	31,011	24,752	55,763
5810 Legal	114,000	0	114,000	115,140	0	115,140	116,291	0	116,291
5820 Audit & CPA	11,654	0	11,654	11,770	0	11,770	11,888	0	11,888
5830 Non-Instructional Software Licenses/Fees	125,590	0	125,590	126,846	0	126,846	128,114	0	128,114
5840 Advertising & Recruitment	38,836	0	38,836	39,224	0	39,224	39,617	0	39,617
5841 Community Marketing	13,300	0	13,300	13,433	0	13,433	13,567	0	13,567
5850 Oversight Fees	134,537	0	134,537	135,882	0	135,882	137,241	0	137,241
5870 Live Scan Finger printing	152	0	152	154	0	154	155	0	155
5878 Testing & Assessments	14,774	0	14,774	14,922	0	14,922	15,071	0	15,071
5880 Instructional Vendors & Consultants	1,112,716	0	1,112,716	1,123,843	0	1,123,843	1,135,082	0	1,135,082
5890 Misc Other Outside Services	5,890	0	5,890	5,949	0	5,949	6,008	0	6,008
5930 Postage	5,092	0	5,092	5,143	0	5,143	5,194	0	5,194
5940 Technology Services	60,002	7,154	67,156	60,602	7,226	67,828	61,208	7,298	68,506
<b>TTL Services &amp; Operations</b>	<b>1,764,323</b>	<b>111,379</b>	<b>1,875,702</b>	<b>1,781,967</b>	<b>112,493</b>	<b>1,894,459</b>	<b>1,799,786</b>	<b>113,618</b>	<b>1,913,404</b>
<b>7438 Interest on Debt</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TTL EXPENDITURES</b>	<b>7,564,569</b>	<b>1,622,077</b>	<b>9,186,646</b>	<b>7,595,429</b>	<b>1,624,399</b>	<b>9,219,828</b>	<b>7,626,598</b>	<b>1,626,743</b>	<b>9,253,342</b>
<b>Description</b>	<b>FY2024-25 Helendale Unrestricted</b>	<b>FY2024-25 Helendale Restricted</b>	<b>FY2024-25 Helendale Combined</b>	<b>FY2025-26 Helendale Unrestricted</b>	<b>FY2025-26 Helendale Restricted</b>	<b>FY2025-26 Helendale Combined</b>	<b>FY2026-27 Helendale Unrestricted</b>	<b>FY2026-27 Helendale Restricted</b>	<b>FY2026-27 Helendale Combined</b>
Revenues less Expenditures (Net Revenues)	51,561	0	51,561	55,606	0	55,606	114,845	0	114,845
Beginning Fund Balance-Unaudited Actuals	1,844,850	919,965	2,764,815	1,896,411	919,965	2,816,376	1,952,017	919,965	2,871,982
ENDING BALANCE	1,896,411	919,965	2,816,376	1,952,017	919,965	2,871,982	2,066,863	919,965	2,986,828
ENDING BALANCE AS % OF EXPENDITURES	25.07%	56.72%	30.66%	25.70%	56.63%	31.15%	27.10%	56.55%	32.28%



DESCRIPTION	FY2024-25 Adopted Budget	FY2025-26 Adopted Budget	FY2026-27 Adopted Budget
	<b>COMBINED</b>	<b>COMBINED</b>	<b>COMBINED</b>
<b>Projected P-2 ADA</b>	<b>1,644.00</b>	<b>1,660.44</b>	<b>1,677.04</b>
<b>COLA</b>	<b>1.07%</b>	<b>0.00%</b>	<b>0.00%</b>
<b>REVENUES:</b>			
<b>General Purpose Entitlement</b>			
8011 General Purpose Block Grant	18,580,499	18,749,897	18,946,468
8012 Education Protection Account	328,800	332,088	335,409
8096 Funding in Lieu of Property Taxes	907,310	907,310	907,310
<b>TTL General Purpose Entitlement</b>	<b>19,816,609</b>	<b>19,989,295</b>	<b>20,189,187</b>
<b>Federal Revenue</b>			
8181 Federal IDEA SpEd Revenue	263,876	266,090	268,751
8290 Other Federal Revenue	269,929	272,236	274,959
<b>TTL Federal Revenue</b>	<b>533,805</b>	<b>538,326</b>	<b>543,710</b>
<b>Other State Revenue</b>			
8311 AB602 State SpEd Revenue	1,531,682	1,544,533	1,559,978
8550 Mandated Cost Reimbursements	51,336	51,726	52,244
8560 State Lottery Revenue	781,666	787,607	795,483
8590 Other State Revenue	1,038,411	1,047,152	1,057,624
<b>TTL Other State Revenue</b>	<b>3,403,095</b>	<b>3,431,018</b>	<b>3,465,329</b>
<b>Other Local Revenue</b>			
8660 Interest Income	200,000	201,702	203,719
8699 Other Revenue	0	0	0
8980 Contributions to Restricted Programs	0	0	0

<b>TTL Other Local Revenue</b>	<b>200,000</b>	<b>201,702</b>	<b>203,719</b>
<b>TTL REVENUES</b>	<b>23,953,509</b>	<b>24,160,342</b>	<b>24,401,945</b>
<b>EXPENDITURES:</b>			
<b>1000 - Certificated Salaries</b>			
1100 Teacher Compensation	6,986,191	6,986,191	6,986,191
1200 Student Support	1,071,165	1,071,165	1,071,165
1300 Certificated Administrators	1,624,562	1,624,562	1,624,562
1900 Other Certificated Salaries	0	0	0
<b>TTL Certificated Salaries</b>	<b>9,681,918</b>	<b>9,681,918</b>	<b>9,681,918</b>
<b>2000 - Non - Certificated Salaries</b>			
2100 Instructional Aides	160,190	160,190	160,190
2300 Classified Administrators	570,945	570,945	570,945
2400 Clerical & Technical Staff	828,680	828,680	828,680
<b>TTL Non - Certificated Salaries</b>	<b>1,559,815</b>	<b>1,559,815</b>	<b>1,559,815</b>
<b>3000 - Employee Benefits</b>			
3101 STRS Certificated	1,934,353	1,934,353	1,934,353
3300 OASDI/Medicare	266,080	266,080	266,080
3400 Health and Welfare	1,300,577	1,300,577	1,300,577
3500 Unemployment Insurance	42,621	42,621	42,621
3600 Workers' Comp Certificated	55,916	55,916	55,916
3901 Other Benefits	246,100	246,100	246,100
<b>TTL Employee Benefits</b>	<b>3,845,647</b>	<b>3,845,647</b>	<b>3,845,647</b>
<b>4000 - Books/Supplies/Materials</b>			
4100 Textbooks & Core Curriculum	1,788,824	1,806,712	1,824,779
4300 Materials & Supplies	213,403	215,537	217,692
4310 Instructional Materials	1,565,211	1,580,863	1,596,672
4320 Office Supplies	0	0	0
4330 Meals & Events	0	0	0
4350 Other Supplies - Materials & Supplies	108,000	109,080	110,171

4400 Non - Capitalized Equipment - Staff	0	0	0
<b>TTL Books/Supplies/Materials</b>	<b>3,675,438</b>	<b>3,712,192</b>	<b>3,749,314</b>
<b>5000 - Services &amp; Operations</b>			
5100 Subagreements For Services	253,594	256,130	258,691
5200 Travel & Conferences	93,500	94,435	95,379
5210 Mileage Reimbursements	0	0	0
5300 Dues & Memberships	69,080	69,771	70,469
5400 Insurance	128,096	129,377	130,671
5610 Facility Rents & Leases	109,088	110,179	111,281
5800 Professional Services - Non - instructional	141,221	142,633	144,060
5810 Legal	300,000	303,000	306,030
5820 Audit & CPA	30,668	30,975	31,284
5830 Non-Instructional Software Licenses/Fees	330,500	333,805	337,143
5840 Advertising & Recruitment	102,200	103,222	104,254
5841 Community Marketing	35,000	35,350	35,704
5850 Oversight Fees	354,044	357,584	361,160
5870 Live Scan Finger printing	400	404	408
5878 Testing & Assessments	38,880	39,269	39,661
5880 Instructional Vendors & Consultants	2,928,200	2,957,482	2,987,057
5890 Misc Other Outside Services	15,500	15,655	15,812
5930 Postage	13,400	13,534	13,669
5940 Technology Services	176,726	178,493	180,278
<b>TTL Services &amp; Operations</b>	<b>5,120,097</b>	<b>5,171,298</b>	<b>5,223,011</b>
<b>7438 Interest on Debt</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TTL EXPENDITURES</b>	<b>23,882,915</b>	<b>23,970,870</b>	<b>24,059,705</b>

Description	FY2024-25 Adopted Budget	FY2025-26 Adopted Budget	FY2026-27 Adopted Budget
<b>Revenues less Expenditures (Net Revenues)</b>	70,594	189,472	342,239
		0	0
<b>Beginning Fund Balance-Unaudited Actuals</b>	8,148,214	8,218,808	8,408,280
<b>ENDING BALANCE</b>	8,218,808	8,408,280	8,750,519
<b>ENDING BALANCE AS % OF EXPENDITURES</b>	34.41%	35.08%	36.37%





## Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Warner	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

## Plan Summary [2024-25]

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Excel Academy Charter School (EACS) is a non-classroom based California charter school offering a tuition-free personalized learning independent study model for students in grades TK-12 . Our high-quality, educational program is rooted in flexible learning, personalized schedules, and proven systems of support where credentialed teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student. The three academic path options, Personalized Elementary Path, Personalized Secondary Path, and Virtual Path, allow families to choose the mode of education that best works for the needs of the individual student and parent. For students on the Personalized Elementary and Secondary Paths, students build a customized learning plan based on individual educational goals with the support of their assigned highly-qualified credentialed teacher. In collaboration with the credentialed Teacher of Record (ToR), parents select from a variety of educational resources, services, and materials. Using these educational resources, families build a customized learning experience for their students, tailored to fit their academic, emotional, and social needs. Students on the personalized paths meet face to face and via a variety of platforms throughout the monthly learning periods to ensure students' unique needs are met, and the students are showing academic growth and progress through grade level and state standards. Teachers, students, and parents consistently collaborate to properly pace and design an instructional schedule to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. On the Virtual Path, students in grades 1-8 benefit from a structured virtual classroom environment overseen by a credentialed teacher. Quality grade-level curriculum is used by the teacher to provide direct, daily instruction to students, as well as to assign independent learning activities. Parents/guardians partner with teachers to ensure students complete all assigned learning activities. Every student enrolled in Excel Academy benefits from the expertise, guidance, and oversight of a credentialed teacher who develops a personal learning plan and pacing guides for each subject for their students. Daily and

weekly communication occurs between teachers, parents, and students to ensure academic progress as well as support social and emotional success. Excel Academy operates on a traditional school calendar with regularly scheduled holidays. EACS is accredited by the Western Association of Schools and Colleges (WASC) which is a statement to the community and educational partners that the institution is reputable, student-oriented, focused on quality education and student performance, and committed to ongoing improvement. EACS believes in fostering strong educational partnerships between the school, parents, students, and stakeholders through continued communication, collaboration, and transparency.

Students enrolled in this school reside in urban, suburban, and rural areas throughout Orange, Riverside, and San Diego Counties. Excel Academy serves a diverse community of students and parents due to the nature of independent study. According to the California Department of Education's DataQuest, in 2023-2024 Excel Academy Charter School - Warner reported an enrollment of 967 students. This includes the enrollment of 42% socio-economically disadvantaged, 3.7% English Learners, 9.7% Special Education, .3% Homeless, and .5% Foster Youth. 33.1% of students enrolled in Excel Academy Charter School - Warner are Hispanic.

#### Mission Statement:

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

#### Our Vision:

We are all about CHOICE:

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

## Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

### Excel Academy Charter School's (EACS) Annual Performance Reflections

#### 1) Local and State Assessment Results

As a California Distinguished School, Excel Academy continues to focus on closing the achievement gap and obtaining exceptional student performance by providing equity-based instruction and a broad course of study. The i-Ready diagnostic benchmark assessments, EACS' local assessments, were administered to measure student progress in the fall, winter, and spring during the 2023-2024 school year. Based on an analysis of our i-Ready fall and spring scores in ELA and Math, EACS demonstrated success in decreasing the percentages of

students in tiers 2 & 3 (one or more grade levels below the current grade level). 74.7% of our students are at or above grade level in ELA. Tier 1 (students at or above grade level) grew over 11% since the first diagnostic in September. 68.8% of EACS students are at or above grade level in math. Tier 1 (students at or above grade level) grew by 18% since the first diagnostic in September. Excel Academy attributes the progress and success to the consistent support and guidance of our credentialed teachers, communication between teachers, students, and parents, the consistent completion of the i-Ready personalized lessons, and the interventions in place to provide specific resources, supplements, and live instruction to close learning gaps and strengthen skills.

25% of students in the WIN Intervention Program reached proficiency in the spring in math and reading.

63% of students in the math, ELA, and ELD intervention classes grew by one grade level or more from fall to spring

73% of the EACS identified homeless and foster youth populations, served through general education, are proficient in math and ELA based on the spring i-Ready benchmark assessment data.

The 2022-2023 CAASPP data showed that EACS' participation rate exceeded state requirements, and EACS students continue to exceed county and state percentages in ELA and math.

66% of students met or exceeded standards in ELA. The percentage remained the same from the 2021-2022 test scores.

56% of students met or exceeded standards in math. There is a 2% increase from the 2021-2022 test scores.

In comparison to 59 charter schools with similar demographics and enrollment, EACS ranked 3rd overall in ELA and 1st overall in math.

We attribute the progress and success our students are showing on the state assessments to the consistent communication and collaboration between the staff with the teachers, teachers with the parents and students, and the implementation of interventions and resources that specifically meet the individual needs of each student. Our students are assessed throughout the year, so teachers can make adjustments to their students' plan of instruction. Students are also provided with test prep packets and virtual sessions to help prepare them for the assessments.

2) EACS believes in fostering strong educational partnerships between the school, parents, students, and all educational partners through continued communication, collaboration, and transparency. EACS values educational partner input to reflect on the school's overall progress, successes, continuous improvement, and to identify and establish the next steps to drive instruction, school-wide goals, and student learner outcomes. Building strong connections with students and parents leads to increased student engagement, learning, and achievement. The dedication of the EACS staff has ensured consistent and valued communication between all educational partners. The number one priority of EACS is the success of all students academically, socially, and emotionally. Through our systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the input survey results, parents and students agree that EACS is dedicated to providing an education that denotes excellence.

Overall Satisfaction Report: Based on 351 parent/guardian responses:

98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)

98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)

98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)

99.4% of survey respondents agree that EACS clearly communicates academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)

Overall Satisfaction Report: Based on 123 student responses (grades 6-12)

96.7% of survey respondents agree that their teacher cares about their education and is committed to helping them succeed.

95.1% of survey respondents agree that the curriculum provides challenging grade level instruction and assessments of their academic progress, and students feel safe and welcome to discuss their progress with their teachers.

95.1% of survey respondents agree that EACS does a great job communicating with students.

Meaning: Overall high satisfaction rate with the school program.

Use: EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and by providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback and analyze the areas that can be maintained and improved upon.

3) Excel Academy offered a plethora of opportunities to build student engagement and peer connections through monthly Outdoor Classroom days where students collaborated on hands-on experiments tied to content standards, virtual learning lessons across all core subjects, and field trips throughout Southern California. In addition, students had access to: Social Emotional Learning Lessons led by credentialed teachers to connect with peers and to learn important life skills, Care Solace surveys to better support mental health, theater productions, Coder-Z, eSports, chess club, and Student Council programs. The GATE (Gifted and Talented Education) Program is thriving with students in grades 3-8 participating in engaging, project-based STEM activities throughout the school year. EACS offered GATE testing using the CogAT8 assessments.

4) EACS students in the "What I Need" WIN intervention program showed tremendous growth in six months after retaking the i-Ready assessments. Additional classes were implemented to serve students who need to focus on early reading and foundational math.

5) English Learners were provided with grade level appropriate weekly live instruction at the appropriate grade level in reading, writing, listening, and speaking to build English language fluency. 39% of students in English Language Development (ELD) classes grew by one or more grade levels in six months based on spring i-Ready results. The students enjoyed the sessions and we are looking forward to seeing the progress they have made on the Summative ELPAC assessment.

7) Excel Academy's 0% suspension and expulsion rates and low chronic absenteeism rate of 0.8% is a success that the school takes great pride in.

8) In addition to continuing to increase the school's A-G course offerings, Excel Academy continued to focus on increasing access to A-G courses with an emphasis on our 9th and 10th grade students. With great success, all core A-G required coursework is accessible for A-G completion. EACS introduced additional support for struggling students to meet Algebra 1 requirements and students are on track to complete the next math sequence.

EACS will continue to build educational partner engagement and CA Dashboard data success by:

1) EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback, and analyze the areas that we can maintain and improve upon. The Administrative and Leadership Teams will continue to evaluate the progress of the personalized and virtual paths offered to EACS students. Annual surveys will be shared to gain feedback and insight on the paths to help determine any necessary implementations or changes that need to be made for the upcoming school year. Parent education will remain a significant focus and an additional Parent Power-Up will be offered in the spring. The 2023-2024 proved to be a successful year with opportunities for parents to engage and learn how to best serve their students educational needs at home by attending webinars and in person trainings at the Parent Summit and first Parent Power-Up.

2) EACS will continue to offer opportunities for students to build rapport with peers while learning to enhance their social-emotional well-being through participation in lessons, conversations, and community engagement.

3) EACS will continue to assess students using i-Ready diagnostic benchmark assessments and encourage completion of personalized lessons to help strengthen skills and close learning gaps. In addition, EACS will continue to provide grade level test prep packets, virtual test prep sessions, and practice tests to help prepare students for state testing. At Excel Academy, our goal is to strive for 100% participation on all required internal and state assessments and to improve test scores by 2% each year.

4) English Learners will continue to be provided with the required English Language Development (ELD) curriculum and mandatory live instruction to help build English fluency in reading, writing, listening, and speaking. EACS' goal is to increase the number of Reclassified Fluent English Proficient (RFEP) students each year.

5) EACS will maintain and build upon our high school graduation success by focusing on supporting students so that they can achieve their goal of high school graduation through continual monitoring of student data to identify students who are struggling and provide interventions to assist students in overcoming barriers so they can be successful and stay on track to complete courses and graduate.

6) The High School Department is working to establish a more transparent A-G tracking system through our school information system for the 2024-2025 school year.

## Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Not Applicable

## Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

### ***Schools Identified***

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable to Excel Academy Charter School - Warner

### ***Support for Identified Schools***

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable to Excel Academy Charter School - Warner

### ***Monitoring and Evaluating Effectiveness***

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable to Excel Academy Charter School - Warner

# Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Administrators (Executive Director, Director of Operations, Director of Business Services, Director of Assessment and Accountability, Director of Special Education, Elementary Principal, Secondary Principal, Assistant Director of Human Resources) - Meetings	Administrators meet bi-monthly - purpose to instill effective strategic planning that aligns educational partners with a shared mission, vision, and productive decision making for students to reach their full academic and social-emotional well-being and potential Principals offer opportunities for educational partner engagement - Examples - "Meet the Principals," Coffee with the Principals Assessment results, curriculum choices, broad course of study, parent education, ADA, graduation, CA Dashboard outcomes, etc. contribute and influence the development of the LCAP
SSC, ELAC, PAC - Meetings	Request input from the advisory groups throughout the school year that influence the goals and actions within the LCAP that will improve student learner outcomes Request completion of EACS surveys from educational partners
PLC (Personal Learning Communities) Meetings	PLCs met monthly (comprised of all elementary, secondary, and intervention teachers) to plan for and support grade level and school-wide goals aligned with the LCAP and student learner outcomes Discuss potential barriers for students, prepare a plan, and implement change to meet the needs of all students Focus on communication with families regarding student strengths and learning gaps - provide strategies, resource tools, guidance, and support to enhance skills and close learning gaps



Educational Partner(s)	Process for Engagement
Governing Board	Provides insight, feedback, and approval (when necessary) on policies, procedures, state reporting, surveys, etc. to improve student learner outcomes associated with the LCAP Community/public is invited to the board meetings
Staff Meetings (ALL STAFF)	The staff meets throughout the school year to: discuss agenda items related (but not limited to) goals and actions, school safety, culture, and climate, procedures and policies, equity-based instruction, elementary, middle, and high school learning opportunities, analysis of local and state data, state reports, etc. that ultimately assists in the development of the LCAP and student learner outcomes
Educational Partner Input Surveys	Staff surveys Parent/Student surveys Feedback from educational partners influence the development of the LCAP
Department Meetings	Department leads meet bi-monthly to discuss planning, success of MTSS, student needs, attendance, student learner outcomes/support, etc.
Student Council and National Honor Society (NHS) - Meetings	Students participating in NHS meet throughout the school year Student Council is an elective course Both Student Council and NHS students focus on leadership characteristics and qualities, discuss ideas and planning for the year, volunteer opportunities, and student needs

#### A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Excel Academy Charter School's (EACS) process for engaging educational partner feedback is based on an analysis of what knowledge was learned from the previous year and the feedback that was received. This year's process consisted of:

- 1) Held consistent administrative, staff, department lead meetings, in addition to SSC, ELAC, PAC, PLC, governing board meetings and input surveys to collaboratively monitor and support LCAP implementation, review data, discuss program updates, and identify potential adjustments to goals and actions
- 2) Updated the EACS LCAP and BOP on the website

- 3) Offered educational partner participation opportunities that consist of: Fall Parent Summit (breakout sessions for parents to meet and engage with EACS administrators and educators, and participate in parent education sessions), Spring Parent Power-Up (Spring PAC meeting, breakout sessions to build on student learning, student-centered activities for students in grades TK-12)
- 4) Offered "Coffee with the Principals" to provide school administrators with input about EACS that drives the LCAP development process
- 5) Hosted "Back to School" events across all regions to engage with students and families who are new or returning to EACS through a variety of activities and Q & A sessions
- 6) Met with NHS and Student Council, EACS' student advisory committee and leadership groups, to request feedback in order to identify student needs and actions to address needs
- 7) Held consistent staff meetings to review and analyze desegregated i-Ready, CAASPP, and Summative ELPAC data to determine the grade level needs within the domains, as well as actions to assist students who are performing below grade level expectations
- 8) Surveyed staff members, parents, and students separately to gather feedback related to student needs and the potential actions to address the identified needs
- 9) Created the SPSA and mid-year LCAP using educational partner feedback which provided insight to update the LCAP
- 10) Shared collected and analyzed assessment data with educational partners, along with the collected survey results and testimonials to keep all partners aware of the input - data included SWD, SED, and EL students
- 11) Provided consistent communication throughout the school year to inform educational partners of upcoming meetings - Communication consisted of posting on Beehively (main communication platform), emails, phone calls, weekly memos and newsletters
- 12) LCAP was presented to the ELAC on May 22, 2024 and SSC on May 23, 2024 for input

EACS' input consisted of feedback provided by educational partners that assisted in the process of finalizing the LCAP. This year's input consisted of:

- 1) Providing opportunities for all students in grades K-11 to increase their i-Ready, CAASPP, and Summative ELPAC scores with additional guided test prep sessions and completion of practice tests
- 2) Focusing on strategies to support staff, student, and parent relationships - building stronger communication skills both in-person and through all available social media platforms, offering more parent education to assist parents at home
- 3) Increasing opportunities to: a) enhance participation at SSC, ELAC, and PAC meetings by focusing on cultural awareness and opportunities to spotlight students, b) participate in community events for all students, including high school students, by creating additional in person events across all regions
- 4) Implementing professional development for staff to stay abreast of: new policies and procedures within their departments (i.e. education, SPED, assessment, operations, and business services), state expectations, assessment analysis of all student groups, grade levels, and content within the ELA and math domains, new strategies to assist all student learning that supports the overall development of academic and social-emotional learning instruction, and strengthening staff leadership skills
- 5) Expanding learning opportunities for foster youth, EL, and socio-economically disadvantaged students  
Improving ELA and math performance for all students and build English proficiency for all EL students while monitoring the progress of LTEL (Long Term English Learner) students
- 6) Providing ongoing instructional support for all students falling one plus grade levels below grade level - providing additional resources, support, live classes, and tutoring
- 7) Focusing on: maintaining high ADA, A-G offered courses, high graduation rate, expanding CTE course offerings, low chronic absenteeism, and zero suspension and expulsion rates

8) Offering additional programs for students (i.e. implementation of the GATE program (with CoGAT8 testing) and the chess club

In response to the ongoing need that the educational partners identified, the feedback influenced the decision to focus on the four goals and actions that are aligned to each goal. Each action was individually addressed and assessed to ensure it is relevant to the current goal, mission, vision, and student learner outcomes identified by the school.

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
1	Excel Academy Charter School (EACS) will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.	Broad Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 7: Course Access (Conditions of Learning)

### An explanation of why the LEA has developed this goal.

**Broad Goal:**  
 With a focus on supporting student achievement, the goal and our actions/services focus on monitoring each student's academic achievement. Continual monitoring of student data to identify struggling students and interventions is important to the success of our students and helps prevent learning gaps. The metrics we utilize to ensure students are on track for graduation include i-Ready, CAASPP, and ELPAC.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2023-2023 CAASPP data.  66% met or exceeded standards 20% nearly met standards 14% not met standards			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.2	CAASPP Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2022-2023 CAASPP data.  56% met or exceeded standards 25% nearly met standards 19% not met standards			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	
1.3	i-Ready ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2024 i-Ready ELA Spring Scores ALL Tier 1: 74.7% Tier 2: 15% Tier 3: 10.3%  English Learners Tier 1: 67% Tier 2: 27% Tier 3: 6%  Economically Disadvantaged Tier 1: 68% Tier 2: 20% Tier 3: 12%  Students w/ IEPs Tier 1: 47% Tier 2: 15% Tier 3: 38%			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	
1.4	i-Ready Math Increase the number of students that have met	2024 i-Ready Math Fall Scores ALL			Increase the number of students that have	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	or exceeded grade level proficiency by 2% each year.	Tier 1: 68.8% Tier 2: 19%% Tier 3: 12.3%  English Learners Tier 1: 52% Tier 2: 33% Tier 3: 15%  Economically Disadvantaged Tier 1: 63% Tier 2: 21% Tier 3: 16%  Students w/ IEPs Tier 1: 42% Tier 2: 11% Tier 3: 47%			met or exceeded grade level proficiency by 2% each year.	
1.5	Increase ELPAC levels annually	A baseline will be developed from 2023-2024 Summative ELPAC data.			Increase number of RFEP students annually based on the Summative ELPAC score reports	
1.6	State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with local indicator outcomes			Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with local indicator outcomes	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.7	State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach			100% of teachers are appropriately credentialed for the courses they teach	
1.8	State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials			0% Students lacking textbooks and other instructional materials	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.



## Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Achievement	1.1 Excel Academy will increase the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in language arts and mathematics through a database system that collects individual formative and summative data. Data collection and analysis includes statewide and internal assessments as measured by the CA Dashboard and accountability systems.		No
1.2	Student Monitoring	1.2 Monitor low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments to review student learner outcomes and ensure academic success as well as social and emotional wellness, or refer to the RTI, SST, or IEP team. Offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.		Yes
1.3	Broad Course of Study	1.3. All students have access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels assisting students in completing standards-aligned content. <ul style="list-style-type: none"> <li>• Online courses, credit recovery, core programs</li> <li>• Supplemental curriculum and materials supporting Common Core Standards</li> <li>• Extended School year</li> <li>• Curriculum aligned to Common Core</li> <li>• English Language Development (ELD) curriculum</li> </ul>	\$12,533,102.00	No
1.4	Professional Development	1.4 Professional development opportunities for teachers and administrators to equip them with information and resources to better serve students and parents, for example, tools for goal setting and curriculum pacing, identifying, supporting, and monitoring students in the "What I Need" (WIN)	\$76,777.00	No

Action #	Title	Description	Total Funds	Contributing
		and English Language Development (ELD) program. Professional development through organizations such as CSSA (California Charter School Association), CSDC (Charter School Development Center) and APLUS+.		
<b>1.5</b>	Parent Training	1.5 Provide parent training, learning opportunities, and workshops on a variety of topics, for example, explaining the EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and teacher parent training.		Yes
<b>1.6</b>	Grade Level Curriculum and Instruction	1.6 Students will be provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.		No
<b>1.7</b>	Student Monitoring and Support	1.7 Identify, support, and monitor students performing one or more years below grade level through the "What I Need" (WIN) intervention program. Students are required to participate in weekly intervention programs that are monitored by the credentialed teacher. Students who are performing below grade level on the fall i-Ready assessments will have the opportunity to take the mid-year i-Ready assessment(s).	\$51,440.00	Yes
<b>1.8</b>	Needs Assessment and Data Analysis	1.8 Use data analysis and historical tracking of performance on internal and state testing to drive our policies, curriculum, and program decisions.	\$9,016.00	No

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
2	Excel Academy Charter School (EACS) will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.	Maintenance of Progress Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)

### An explanation of why the LEA has developed this goal.

#### Maintenance Goal:

We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal and actions/services are focused on student, family, and teacher engagement and connectedness to attain a high average daily attendance.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintain or decrease chronic absenteeism rate of .01%	A baseline will be developed from 2023-2024 data			Continue to maintain or decrease Chronic Absenteeism rate of .01%	
2.2	Strive for 0% expulsion rate each year	0% Expulsion Rate			Maintain 0% expulsion rate each year	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.3	Strive for 0% suspension rate each year	0% Suspension Rate			Maintain 0% suspension rate each year	
2.4	State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach			100% of teachers are appropriately credentialed for the courses they teach	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
2.1	School Climate and Student Engagement	2.1 Focus on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides.	\$55,369.00	No
2.2	Certificated and Classified Salaries and Benefits	2.2 Recruit and retain highly qualified multiple and single-subject teachers and classified staff, maintaining appropriate assignments and remaining competitive with salary and benefits.	\$161,886.00	No
2.3	Educational Partner Communication	2.3 Frequent communication with parents/students to notify them of school events, opportunities, and resources through Beehively, email, the school website, and social media platforms. We will build partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.	\$32,550.00	No
2.4	Technology	2.4 Purchase technological devices and provide professional development to promote student engagement and develop 21st Century skills and support access to instruction as needed.	\$62,000.00	No
2.5	Professional Development	2.5 Professional development in cultural awareness.		No

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
3	Excel Academy Charter School (EACS) will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.	

State Priorities addressed by this goal.

Priority 3: Parental Involvement (Engagement)  
 Priority 5: Pupil Engagement (Engagement)  
 Priority 6: School Climate (Engagement)

An explanation of why the LEA has developed this goal.

Maintenance Goal:

Establishing connections and partnerships in education with our students and parents correlates with students attending school more regularly, earning higher grades, and graduating from high school. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2023-2024 Maintain or increase by 2%			Maintain or increase by 2%	
3.2	State Local Indicator Priority 6:	Overall Satisfaction Report: Based on 351			Maintain or increase by 2%	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
	<p>Overall Satisfaction Rate Survey Results Maintain or increase by 2% each year</p>	<p>parent/guardian responses:</p> <p>98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)</p> <p>98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)</p> <p>98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)</p> <p>99.4% of survey respondents agree that EACS clearly communicates</p>				



Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)				
3.3	Safety Plan Review and Training	Annual Review/Updates and Training Dates			Consistent plan and review process	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Educational Partner Engagement	3.1 EACS will seek parent input and assess our level of educational partner engagement through parent participation in LP, ELAC, SSC, and PAC meetings, surveys, and Student Council, SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have opportunities for participation and input.		No
3.2	Educational Partner Partnerships	3.2 EACS will engage our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success.	\$419,305.00	Yes
3.3	School Climate	3.3 EACS will build relationships by ensuring that all parents, students, and teachers feel that our schools are providing a safe, positive, inclusive, and welcoming learning environment.	\$85,188.00	No
3.4	Student Services	3.4 EACS will properly vet all newly hired Content and Community Providers to ensure standards alignment and safety for our students.	\$58,656.00	No
3.5	School Climate and School Safety	3.5 EACS will continue to maintain a safe learning environment for all students by training the teachers and staff on school-wide safety plans.		No
3.6	Communication and Translation Services	3.6 EACS will provide notices, reports, statements, or records sent to a student, parent, or guardian will be translated as needed. Documents, records, and statements will be sent upon request by clerical staff.	\$0.00	Yes
3.7	School Operating Services	3.7 EACS' operations of the charter are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.		No



# Goals and Actions

## Goal

Goal #	Description	Type of Goal
4	We will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all educational partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.	Broad Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

### An explanation of why the LEA has developed this goal.

#### Broad Goal:

With a focus on supporting our students to achieve their goal of high school graduation and college and career preparedness, the goal and actions/services focuses on monitoring each student's progress toward graduation. The continual monitoring of student data to identify struggling students and interventions is important to the success of our students staying on-track with course completion and on course to graduation. Graduation rate, college/career preparedness, and CTE participation are all metrics we monitor to ensure students are on track to graduate and to achieve their post-graduation goals.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.1	Graduation Rate Dropout Rate	Develop a baseline from 2020-21 data			Increase the graduation rate and decrease the dropout rate	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.2	Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU prepared			Increase the CTE participants and students who are UC/CSU prepared	
4.3	Access to a Broad Curriculum: College/Career Prepared  Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	Develop a baseline for students enrolled in and completion of A-G courses required for UC/CSU Admission			Increase number of students enrolled in A-G courses required for UC/CSU Admission	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
4.1	College and Career Readiness and Career Technical Education	4.1 Consistent with California College and Career Indicators, develop a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals; continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.	\$10,961.00	No
4.2	High School Graduation	4.2 Students transitioning from middle to high school will be monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.	\$285,697.00	No
4.3	High School Curriculum and Instruction	4.3 Provide high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.	\$846,300.00	No
4.4	Testing	4.4 Ensure all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities.	\$3,844.00	Yes
4.5	Testing	4.5 Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.		Yes
4.6	A-G and Career Technical Education Courses	4.6 Expand our A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.	\$23,211.00	No

Action #	Title	Description	Total Funds	Contributing
4.7	Needs Assessment - Data Analysis	4.7 Analyze 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Provide targeted interventions and resources to students identified as needing additional support.		No



# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2024-25]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$928,056	\$0

## Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
8.365%	2.916%	\$312,580.00	11.281%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

## Required Descriptions

### LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.2	<p><b>Action:</b> Student Monitoring</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b></p>	Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments is necessary to evaluate student progress and to identify areas of strength and needs withing ELA and math domains. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	LEA-wide	academic growth, in addition to social-emotional awareness classes and character building.	
1.5	<p><b>Action:</b> Parent Training</p> <p><b>Need:</b> Parents - Home Educators</p> <p><b>Scope:</b> LEA-wide</p>	Providing parent training, learning opportunities, and workshops on a variety of topics will guide parents to provide the best educational support at home for their students.	Survey results Student academic progress and growth monitoring - assessments, learning period meeting attendance and work samples
1.7	<p><b>Action:</b> Student Monitoring and Support</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> LEA-wide</p>	Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments will provide the appropriate data to review student learner outcomes and provide students with the appropriate resources and interventions to meet grade level expectations. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students
3.2	<p><b>Action:</b> Educational Partner Partnerships</p> <p><b>Need:</b> Administrators, teachers, staff, parents, students, governing board, community/public</p> <p><b>Scope:</b> LEA-wide</p>	Engaging EACS educational partners in an intentional, meaningful, and consistent manner by monitoring student performance and providing timely interventions will help promote growth and success for students to meet their individual goals and meet or exceed grade level expectations.	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
			Growth and progress analysis from the teachers assigned to the students
3.6	<p><b>Action:</b> Communication and Translation Services</p> <p><b>Need:</b> Educational Partners - Parents, guardians, students</p> <p><b>Scope:</b> LEA-wide</p>	Ongoing communication in English and in the students' home language (upon request) keeps an open line of communication to better support individual student needs and keeps educational partners aware of policies, procedures, events, important notices, etc. that guide student learning.	Survey responses Teacher feedback Department lead feedback Attendance at school events
4.4	<p><b>Action:</b> Testing</p> <p><b>Need:</b> All students including low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> LEA-wide</p>	Ensuring that all students have the opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities, sets students up for success on the state assessments. CAASPP preparation includes oversight from assigned teacher to make sure the students are paced properly with their ELA and math curriculum, have intervention support if needed, tutoring support if needed, access to test prep packets, live test prep sessions with EACS teachers, and state practice tests.	Director of Assessment and Accountability Feedback Intervention Department Feedback Teacher Feedback CAASPP test scores
4.5	<p><b>Action:</b> Testing</p> <p><b>Need:</b> Low-income pupils and foster youth</p> <p><b>Scope:</b> LEA-wide</p>	Providing advanced placement exam costs for low-income and foster youth who are experiencing financial hardship provides students with the necessary support to complete exams.	Admission Team and High School Principal Feedback

**Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
<p><b>1.2</b></p>	<p><b>Action:</b> Student Monitoring</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> Limited to Unduplicated Student Group(s)</p>	<p>Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments is necessary to evaluate student progress and to identify areas of strength and needs withing ELA and math domains. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.</p>	<p>i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students</p>

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Services for our low-income, English Learners, and foster youth are targeted interventions that were identified through a collaborative effort with the school’s Executive Director, Director of Assessment and Accountability, Assistant Director of Intervention, High School Principal, and High School Counselors. The goals and actions in the LCAP are focused on increasing services and improving the quality of the academic support to improve student performance, educational partner engagement, and the level of college and career readiness of our student groups. Through a collaborative effort, the school leadership team, taking into account the feedback provided from all educational partners, identified the next steps to growth towards each of our goals. We expect to see improvement in student engagement and achievement as reflected in i-Ready and CAASPP test scores, and an increase in our graduation and college and career readiness rate.

### **Additional Concentration Grant Funding**

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

<b>Staff-to-student ratios by type of school and concentration of unduplicated students</b>	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	N/A	N/A
Staff-to-student ratio of certificated staff providing direct services to students	N/A	N/A

# 2024-25 Total Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	11,094,651	928,056	8.365%	2.916%	11.281%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$12,022,707.00	\$2,228,342.00	\$124,000.00	\$340,253.00	\$14,715,302.00	\$9,218,943.00	\$5,496,359.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Achievement	All	No				2022-2025							
1	1.2	Student Monitoring	English Foster Low Learners Youth Income	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	2022-2025							
1	1.3	Broad Course of Study	All	No				2022-2025	\$8,200,014.00	\$4,333,088.00	\$10,147,281.00	\$2,084,825.00	\$124,000.00	\$176,996.00	\$12,533,102.00
1	1.4	Professional Development	All	No			All Schools	2022-2025	\$0.00	\$76,777.00	\$0.00	\$49,290.00	\$0.00	\$27,487.00	\$76,777.00
1	1.5	Parent Training	English Learners	Yes	LEA-wide	English Learners	All Schools	2022-2025							
1	1.6	Grade Level Curriculum and Instruction	All	No				2022-2025							
1	1.7	Student Monitoring and Support	English Foster Low Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-2025	\$0.00	\$51,440.00				\$51,440.00	\$51,440.00
1	1.8	Needs Assessment and Data Analysis	All	No				2022-2025	\$0.00	\$9,016.00		\$9,016.00			\$9,016.00
2	2.1	School Climate and Student Engagement	All	No				2022-2025	\$55,369.00	\$0.00	\$55,369.00				\$55,369.00
2	2.2	Certificated and Classified Salaries and Benefits	All	No				2022-2025	\$161,886.00	\$0.00	\$161,886.00				\$161,886.00

Goal #	Action #	Action Title	Student Group(s)		Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
2	2.3	Educational Partner Communication	All		No				2022-2025	\$0.00	\$32,550.00	\$32,550.00				\$32,550.00
2	2.4	Technology	All		No				2022-2025	\$0.00	\$62,000.00		\$62,000.00			\$62,000.00
2	2.5	Professional Development	All		No				2021-2024							
3	3.1	Educational Partner Engagement	All		No				2022-2025							
3	3.2	Educational Partner Partnerships	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-2025	\$419,305.00	\$0.00	\$334,975.00			\$84,330.00	\$419,305.00
3	3.3	School Climate	All		No				2022-2025	\$0.00	\$85,188.00	\$85,188.00				\$85,188.00
3	3.4	Student Services	All		No				2022-2025	\$58,656.00	\$0.00	\$58,656.00				\$58,656.00
3	3.5	School Climate and School Safety	All		No				2022-2025							
3	3.6	Communication and Translation Services	English	Learners	Yes	LEA-wide	English Learners	All Schools	2022-2025	\$0.00	\$0.00	\$0.00				\$0.00
3	3.7	School Operating Services	All		No				2022-2025							
4	4.1	College and Career Readiness and Career Technical Education	All		No				2022-2025	\$10,961.00	\$0.00	\$10,961.00				\$10,961.00
4	4.2	High School Graduation	All		No				2022-2025	\$285,697.00	\$0.00	\$285,697.00				\$285,697.00
4	4.3	High School Curriculum and Instruction	All		No				2022-2025	\$0.00	\$846,300.00	\$846,300.00				\$846,300.00
4	4.4	Testing	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-2025	\$3,844.00	\$0.00	\$3,844.00				\$3,844.00
4	4.5	Testing	Foster Low	Youth Income	Yes	LEA-wide	Foster Youth Low Income	All Schools	2022-2025							
4	4.6	A-G and Career Technical Education Courses	All		No				2022-2025	\$23,211.00	\$0.00		\$23,211.00			\$23,211.00
4	4.7	Needs Assessment - Data Analysis	All		No				2022-2025							



Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds

# 2024-25 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
11,094,651	928,056	8.365%	2.916%	11.281%	\$338,819.00	0.000%	3.054 %	<b>Total:</b>	\$338,819.00
								<b>LEA-wide Total:</b>	\$338,819.00
								<b>Limited Total:</b>	\$0.00
								<b>Schoolwide Total:</b>	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.2	Student Monitoring	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		
1	1.4	Professional Development				All Schools	\$0.00	
1	1.5	Parent Training	Yes	LEA-wide	English Learners	All Schools		
1	1.7	Student Monitoring and Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
3	3.2	Educational Partner Partnerships	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$334,975.00	
3	3.6	Communication and Translation Services	Yes	LEA-wide	English Learners	All Schools	\$0.00	
4	4.4	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$3,844.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
4	4.5	Testing	Yes	LEA-wide	Foster Youth Low Income	All Schools		

# 2023-24 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
<b>Totals</b>	\$13,964,360.00	\$13,472,108.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
1	1.1	Student Achievement	No		
1	1.2	Student Monitoring	Yes		
1	1.3	Broad Course of Study	No	\$11,849,528.00	\$11,532,204
1	1.4	Professional Development	No	\$96,360.00	\$82,959.00
1	1.5	Parent Training	Yes		
1	1.6	Grade Level Curriculum and Instruction	No		
1	1.7	Student Monitoring and Support	Yes	\$60,910.00	\$27,174.00
1	1.8	Needs Assessment and Data Analysis	No	\$9,600.00	\$9,600.00
2	2.1	School Climate and Student Engagement	No	\$52,202.00	\$41,734.00
2	2.2	Certificated and Classified Salaries and Benefits	No	\$161,382.00	\$154,284.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.3	Educational Partner Communication	No	\$24,241.00	\$24,241.00
2	2.4	Technology	No	\$132,000.00	\$92,611
2	2.5	Professional Development	No		
3	3.1	Educational Partner Engagement	No		
3	3.2	Educational Partner Partnerships	Yes	\$414,540.00	\$348,242.00
3	3.3	School Climate	No	\$65,748.00	\$63,000.00
3	3.4	Student Services	No	\$61,286.00	\$61,286.00
3	3.5	School Climate and School Safety	No		
3	3.6	Communication and Translation Services	Yes	\$6,308.00	\$6,308.00
3	3.7	School Operating Services	No		
4	4.1	College and Career Readiness and Career Technical Education	No	\$16,000.00	\$6,500.00
4	4.2	High School Graduation	No	\$208,431.00	\$266,615.00
4	4.3	High School Curriculum and Instruction	No	\$625,124.00	\$610,050.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	4.4	Testing	Yes	\$148,970.00	\$145,300.00
4	4.5	Testing	Yes		
4	4.6	A-G and Career Technical Education Courses	No	\$31,730.00	\$0
4	4.7	Needs Assessment - Data Analysis	No		

# 2023-24 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$812,430.00	\$569,818.00	\$499,850.00	\$69,968.00	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
startcol lapse							
1	1.2	Student Monitoring	Yes				
1	1.5	Parent Training	Yes				
1	1.7	Student Monitoring and Support	Yes				
3	3.2	Educational Partner Partnerships	Yes	\$414,540.00	\$348,242.00		
3	3.6	Communication and Translation Services	Yes	\$6,308.00	\$6,308.00		
4	4.4	Testing	Yes	\$148,970.00	\$145,300.00		
4	4.5	Testing	Yes				

To Add a Row: Click "Add Row."

To Delete a Row: Remove all content from each cell, checkbox and dropdown of a row (including spaces), press "Save Data" and refresh the page.



# 2023-24 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
\$10,719,774	\$812,430.00	0	7.579%	\$499,850.00	0.000%	4.663%	\$312,580.00	2.916%

# Local Control and Accountability Plan Instructions

## [Plan Summary](#)

## [Engaging Educational Partners](#)

## [Goals and Actions](#)

## [Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [LCFF@cde.ca.gov](mailto:LCFF@cde.ca.gov).

## Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
  - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
    - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (*EC* sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.

# Plan Summary

## Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

## Requirements and Instructions

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

### Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

### Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

### **Comprehensive Support and Improvement**

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

#### Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

#### Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

#### Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## **Engaging Educational Partners**

### **Purpose**

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

### **Requirements**

**School districts and COEs:** *EC* sections [52060\(g\) \(California Legislative Information\)](#) and [52066\(g\) \(California Legislative Information\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

**Charter schools:** *EC* Section [47606.5\(d\) \(California Legislative Information\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062 \(California Legislative Information\)](#);
  - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).

- For COEs, see [Education Code Section 52068 \(California Legislative Information\)](#); and
- For charter schools, see [Education Code Section 47606.5 \(California Legislative Information\)](#).
- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

## Instructions

### Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

### Complete the table as follows:

#### Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

#### Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.



- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is not necessarily limited to:
  - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
  - Inclusion of metrics other than the statutorily required metrics
  - Determination of the target outcome on one or more metrics
  - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
  - Inclusion of action(s) or a group of actions
  - Elimination of action(s) or group of actions
  - Changes to the level of proposed expenditures for one or more actions
  - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
  - Analysis of effectiveness of the specific actions to achieve the goal
  - Analysis of material differences in expenditures
  - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
  - Analysis of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

### Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
  - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

### Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

#### Focus Goal(s)

##### Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

##### Type of Goal

Identify the type of goal being implemented as a Focus Goal.

##### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

##### An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

### **Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding**

#### Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
  - (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
  - An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
    - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
    - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

#### Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

#### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

#### An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
  - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

**Note:** EC Section [42238.024\(b\)\(1\) \(California Legislative Information\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

## Broad Goal

### Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.
- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

### Type of Goal

Identify the type of goal being implemented as a Broad Goal.

### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

### **Maintenance of Progress Goal**

#### Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

#### Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

#### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

### **Measuring and Reporting Results:**

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.
- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
  - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
  
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
  - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
  - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

Complete the table as follows:

**Metric #**

- Enter the metric number.

**Metric**

- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

**Baseline**

- Enter the baseline when completing the LCAP for 2024–25.
  - Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).
  - Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.
  - Indicate the school year to which the baseline data applies.
  - The baseline data must remain unchanged throughout the three-year LCAP.
    - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain

accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.

- If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
- Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

## Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
  - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

## Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.
  - Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

## Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
  - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

## Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
  - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.



Timeline for school districts and COEs for completing the **Measuring and Reporting Results** part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2025–26</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2026–27</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2025–26</b> and <b>2026–27</b> . Leave blank until then.

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

**Note:** When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
  - Include a discussion of relevant challenges and successes experienced with the implementation process.
  - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

## A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
  - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
  - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
  - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

## A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
  - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:
    - The reasons for the ineffectiveness, and
    - How changes to the action will result in a new or strengthened approach.

### **Actions:**

Complete the table as follows. Add additional rows as necessary.

#### Action #

- Enter the action number.

#### Title

- Provide a short title for the action. This title will also appear in the action tables.

#### Description

- Provide a brief description of the action.

- For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
- As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
- These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

## Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

## Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
  - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496 in the Increased or Improved Services section of the LCAP.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

## Required Actions

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
  - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
  - Professional development for teachers.
  - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.
- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
  - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
  - These required actions will be effective for the three-year LCAP cycle.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA’s description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

### Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC* Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

## LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

### For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

## Requirements and Instructions

Complete the tables as follows:

### Total Projected LCFF Supplemental and/or Concentration Grants

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

### Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

### Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

### LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

**LCFF Carryover — Dollar**

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

**Total Percentage to Increase or Improve Services for the Coming School Year**

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA’s percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

**Required Descriptions:**

**LEA-wide and Schoolwide Actions**

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

**Identified Need(s)**

Provide an explanation of the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

**How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis**

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.

- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

### **Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

**Note for COEs and Charter Schools:** In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

### **Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

### **Identified Need(s)**

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

### **How the Action(s) are Designed to Address Need(s)**

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

### **Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.



- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

### **Additional Concentration Grant Funding**

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.
- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
  - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

- The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
  - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
  - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

## Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

## Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8).

Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***
- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.

- **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
- **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate “All Schools.” If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter “Specific Schools” or “Specific Grade Spans.” Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year,” or “2 Years,” or “6 Months.”
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.
- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
  - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
  - **Note:** Equity Multiplier funds must be included in the “Other State Funds” category, not in the “LCFF Funds” category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA’s LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as

a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.

- As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

## Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

## Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

## Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.

- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
  - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

### Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
  - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**



- This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

### **Contributing Actions Annual Update Table**

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**

- This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.

- **4. Total Planned Contributing Expenditures (LCFF Funds)**

- This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).

- **7. Total Estimated Actual Expenditures for Contributing Actions**

- This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).

- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**

- This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).

- **5. Total Planned Percentage of Improved Services (%)**

- This amount is the total of the Planned Percentage of Improved Services column.

- **8. Total Estimated Actual Percentage of Improved Services (%)**

- This amount is the total of the Estimated Actual Percentage of Improved Services column.

- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**

- This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

### **LCFF Carryover Table**

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**



- This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.

- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**

- This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).

- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education  
November 2023



## Local Control and Accountability Plan

The instructions for completing the Local Control and Accountability Plan (LCAP) follow the template.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Excel Academy Charter School - Helendale	Heidi Gasca Executive Director	hgasca@excelacademy.education (949) 412-3122

## Plan Summary [2024-25]

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Excel Academy Charter School (EACS) is a non-classroom based California charter school offering a tuition-free personalized learning independent study model for students in grades TK-12 . Our high-quality, educational program is rooted in flexible learning, personalized schedules, and proven systems of support where credentialed teachers and parents collaborate to provide academic excellence and social and emotional foundations to instill a love for learning in each individual student. The three academic path options, Personalized Elementary Path, Personalized Secondary Path, and Virtual Path, allow families to choose the mode of education that best works for the needs of the individual student and parent. For students on the Personalized Elementary and Secondary Paths, students build a customized learning plan based on individual educational goals with the support of their assigned highly-qualified credentialed teacher. In collaboration with the credentialed Teacher of Record (ToR), parents select from a variety of educational resources, services, and materials. Using these educational resources, families build a customized learning experience for their students, tailored to fit their academic, emotional, and social needs. Students on the personalized paths meet face to face and via a variety of platforms throughout the monthly learning periods to ensure students' unique needs are met, and the students are showing academic growth and progress through grade level and state standards. Teachers, students, and parents consistently collaborate to properly pace and design an instructional schedule to successfully work through grade-level Common Core State Standards with pre-approved curriculum options. On the Virtual Path, students in grades 1-8 benefit from a structured virtual classroom environment overseen by a credentialed teacher. Quality grade-level curriculum is used by the teacher to provide direct, daily instruction to students, as well as to assign independent learning activities. Parents/guardians partner with teachers to ensure students complete all assigned learning activities. Every student enrolled in Excel Academy benefits from the expertise, guidance, and oversight of a credentialed teacher who develops a personal learning plan and pacing guides for each subject for their students. Daily and

weekly communication occurs between teachers, parents, and students to ensure academic progress as well as support social and emotional success. Excel Academy operates on a traditional school calendar with regularly scheduled holidays. EACS is accredited by the Western Association of Schools and Colleges (WASC) which is a statement to the community and educational partners that the institution is reputable, student-oriented, focused on quality education and student performance, and committed to ongoing improvement. EACS believes in fostering strong educational partnerships between the school, parents, students, and stakeholders through continued communication, collaboration, and transparency.

Students enrolled in this school reside in urban, suburban, and rural areas throughout San Bernardino, Los Angeles, Kern, and Inyo counties. Excel Academy serves a diverse community of students and parents due to the nature of independent study. According to the California Department of Education's DataQuest, in 2023-2024 Excel Academy Charter School - Helendale reported an enrollment of 602 students. This includes the enrollment of 49% socio-economically disadvantaged, 4.4% English Learners, 12% Special Education, .6% Homeless, and .3% Foster Youth. 45.2% of students enrolled in Excel Academy Charter School- Helendale are Hispanic.

#### Mission Statement:

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

#### Our Vision:

We are all about CHOICE:

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

## Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

### Excel Academy Charter School's (EACS) Annual Performance Reflections

#### 1) Local and State Assessment Results

As a California Distinguished School, Excel Academy continues to focus on closing the achievement gap and obtaining exceptional student performance by providing equity-based instruction and a broad course of study. The i-Ready diagnostic benchmark assessments, EACS' local assessment, were administered to measure student progress in the fall, winter, and spring during the 2023-2024 school year. Based on an analysis of our i-Ready fall and spring scores in ELA and Math, EACS demonstrated success in decreasing the percentages of students in tiers 2 & 3 (one or more grade levels below the current grade level). 72.2% of our students are at or above grade level in ELA. Tier 1 (students at or above grade level) grew over 12% since the first diagnostic in September. 63.1% of EACS students are at or above grade level in math. Tier 1 (students at or above grade level) grew by 18% since the first diagnostic in September. Excel Academy attributes the progress and success to the consistent support and guidance of our credentialed teachers, communication between teachers, students, and parents, the consistent completion of the i-Ready personalized lessons, and the interventions in place to provide specific resources, supplements, and live instruction to close learning gaps and strengthen skills.

25% of students in the WIN Intervention Program reached proficiency in the spring in math and reading.

63% of students in the math, ELA, and ELD intervention classes grew by one grade level or more from fall to spring

73% of the EACS identified homeless and foster youth populations, served through general education, are proficient in math and ELA based on the spring i-Ready benchmark assessment data.

The 2022-2023 CAASPP data showed that EACS' participation rate exceeded state requirements, and EACS students continue to exceed county and state percentages in ELA and math.

60% of students met or exceeded standards in ELA. There is a 1% increase from the 2021-2022 test scores.

48% of students met or exceeded standards in math. The percentage remained the same from the 2021-2022 test scores.

In comparison to 59 charter schools with similar demographics and enrollment, EACS ranked 7th overall in ELA and 4th overall in math.

We attribute the progress and success our students are showing on the state assessments to the consistent communication and collaboration between the staff with the teachers, teachers with the parents and students, and the implementation of interventions and resources that specifically meet the individual needs of each student. Our students are assessed throughout the year, so teachers can make adjustments to their students' plan of instruction. Students are also provided with test prep packets and virtual sessions to help prepare them for the assessments.

2) EACS believes in fostering strong educational partnerships between the school, parents, students, and all educational partners through continued communication, collaboration, and transparency. EACS values educational partner input to reflect on the school's overall progress, successes, continuous improvement, and to identify and establish the next steps to drive instruction, school-wide goals, and student learner outcomes. Building strong connections with students and parents leads to increased student engagement, learning, and achievement. The dedication of the EACS staff has ensured consistent and valued communication between all educational partners. The number one priority of EACS is the success of all students academically, socially, and emotionally. Through our systems in place, all students' individual needs are addressed and supported as each student is encouraged and guided to meet or exceed grade level expectations. Based on the input survey results, parents and students agree that EACS is dedicated to providing an education that denotes excellence.

Overall Satisfaction Report: Based on 351 parent/guardian responses:

98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)

98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)

98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)

99.4% of survey respondents agree that EACS clearly communicates academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)

Overall Satisfaction Report: Based on 123 student responses (grades 6-12)

96.7% of survey respondents agree that their teacher cares about their education and is committed to helping them succeed.

95.1% of survey respondents agree that the curriculum provides challenging grade level instruction and assessments of their academic progress, and students feel safe and welcome to discuss their progress with their teachers.

95.1% of survey respondents agree that EACS does a great job communicating with students.

Meaning: Overall high satisfaction rate with the school program.

Use: EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and by providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback and analyze the areas that can be maintained and improved upon.

3) Excel Academy offered a plethora of opportunities to build student engagement and peer connections through monthly Outdoor Classroom days where students collaborated on hands-on experiments tied to content standards, virtual learning lessons across all core subjects, and field trips throughout Southern California. In addition, students had access to: Social Emotional Learning Lessons led by credentialed teachers to connect with peers and to learn important life skills, Care Solace surveys to better support mental health, theater productions, Coder-Z, eSports, chess club, and Student Council programs. The GATE (Gifted and Talented Education) Program is thriving with students in grades 3-8 participating in engaging, project-based STEM activities throughout the school year. EACS offered GATE testing using the CogAT8 assessments.

4) EACS students in the "What I Need" WIN intervention program showed tremendous growth in six months after retaking the i-Ready assessments. Additional classes were implemented to serve students who need to focus on early reading and foundational math.

5) English Learners were provided with grade level appropriate weekly live instruction at the appropriate grade level in reading, writing, listening, and speaking to build English language fluency. 39% of students in English Language Development (ELD) classes grew by one or

more grade levels in six months based on spring i-Ready results. The students enjoyed the sessions and we are looking forward to seeing the progress they have made on the Summative ELPAC assessment.

7) Excel Academy's 0% suspension and expulsion rates and low chronic absenteeism rate of 0.8% is a success that the school takes great pride in.

8) In addition to continuing to increase the school's A-G course offerings, Excel Academy continued to focus on increasing access to A-G courses with an emphasis on our 9th and 10th grade students. With great success, all core A-G required coursework is accessible for A-G completion. EACS introduced additional support for struggling students to meet Algebra 1 requirements and students are on track to complete the next math sequence.

EACS will continue to build educational partner engagement and CA Dashboard data success by:

1) EACS will maintain focus on student progress and success through transparency, consistent communication and collaboration with educational partners, and providing resources, support, and opportunities for all students to continue to grow as lifelong learners. EACS will survey educational partners for feedback, and analyze the areas that we can maintain and improve upon. The Administrative and Leadership Teams will continue to evaluate the progress of the personalized and virtual paths offered to EACS students. Annual surveys will be shared to gain feedback and insight on the paths to help determine any necessary implementations or changes that need to be made for the upcoming school year. Parent education will remain a significant focus and an additional Parent Power-Up will be offered in the spring. The 2023-2024 proved to be a successful year with opportunities for parents to engage and learn how to best serve their students educational needs at home by attending webinars and in person trainings at the Parent Summit and first Parent Power-Up.

2) EACS will continue to offer opportunities for students to build rapport with peers while learning to enhance their social-emotional well-being through participation in lessons, conversations, and community engagement.

3) EACS will continue to assess students using i-Ready diagnostic benchmark assessments and encourage completion of personalized lessons to help strengthen skills and close learning gaps. In addition, EACS will continue to provide grade level test prep packets, virtual test prep sessions, and practice tests to help prepare students for state testing. At Excel Academy, our goal is to strive for 100% participation on all required internal and state assessments and to improve test scores by 2% each year.

4) English Learners will continue to be provided with the required English Language Development (ELD) curriculum and mandatory live instruction to help build English fluency in reading, writing, listening, and speaking. EACS' goal is to increase the number of Reclassified Fluent English Proficient (RFEP) students each year.

5) EACS will maintain and build upon our high school graduation success by focusing on supporting students so that they can achieve their goal of high school graduation through continual monitoring of student data to identify students who are struggling and provide interventions to assist students in overcoming barriers so they can be successful and stay on track to complete courses and graduate.

6) The High School Department is working to establish a more transparent A-G tracking system through our school information system for the 2024-2025 school year.

## Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Not Applicable

## Comprehensive Support and Improvement

An LEA with a school or schools eligible for comprehensive support and improvement must respond to the following prompts.

### ***Schools Identified***

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

Not Applicable to Excel Academy Charter School – Helendale

### ***Support for Identified Schools***

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

Not Applicable to Excel Academy Charter School – Helendale

### ***Monitoring and Evaluating Effectiveness***

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

Not Applicable to Excel Academy Charter School – Helendale



# Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Educational Partner(s)	Process for Engagement
Administrators (Executive Director, Director of Operations, Director of Business Services, Director of Assessment and Accountability, Director of Special Education, Elementary Principal, Secondary Principal, Assistant Director of Human Resources) - Meetings	Administrators meet bi-monthly - purpose to instill effective strategic planning that aligns educational partners with a shared mission, vision, and productive decision making for students to reach their full academic and social-emotional well-being and potential Principals offer opportunities for educational partner engagement - Examples - "Meet the Principals," Coffee with the Principals Assessment results, curriculum choices, broad course of study, parent education, ADA, graduation, CA Dashboard outcomes, etc. contribute and influence the development of the LCAP
SSC, ELAC, PAC - Meetings	Request input from the advisory groups throughout the school year that influence the goals and actions within the LCAP that will improve student learner outcomes Request completion of EACS surveys from educational partners
PLC (Personal Learning Communities) Meetings	PLCs met monthly (comprised of all elementary, secondary, and intervention teachers) to plan for and support grade level and school-wide goals aligned with the LCAP and student learner outcomes Discuss potential barriers for students, prepare a plan, and implement change to meet the needs of all students Focus on communication with families regarding student strengths and learning gaps - provide strategies, resource tools, guidance, and support to enhance skills and close learning gaps

Educational Partner(s)	Process for Engagement
Governing Board	Provides insight, feedback, and approval (when necessary) on policies, procedures, state reporting, surveys, etc. to improve student learner outcomes associated with the LCAP Community/public is invited to the board meetings
Staff Meetings (ALL STAFF)	The staff meets throughout the school year to: discuss agenda items related (but not limited to) goals and actions, school safety, culture, and climate, procedures and policies, equity-based instruction, elementary, middle, and high school learning opportunities, analysis of local and state data, state reports, etc. that ultimately assists in the development of the LCAP and student learner outcomes.
Educational Partner Input Surveys	Staff surveys Parent/Student surveys Feedback from educational partners influence the development of the LCAP
Department Meetings	Department leads meet bi-monthly to discuss planning, success of MTSS, student needs, attendance, student learner outcomes/support, etc.
Student Council and National Honor Society (NHS) - Meetings	Students participating in NHS meet throughout the school year Student Council is an elective course Both Student Council and NHS students focus on leadership characteristics and qualities, discuss ideas and planning for the year, volunteer opportunities, and student needs

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Excel Academy Charter School's (EACS) process for engaging educational partner feedback is based on an analysis of what knowledge was learned from the previous year and the feedback that was received. This year's process consisted of:

- 1) Held consistent administrative, staff, department lead meetings, in addition to SSC, ELAC, PAC, PLC, governing board meetings and input surveys to collaboratively monitor and support LCAP implementation, review data, discuss program updates, and identify potential adjustments to goals and actions
- 2) Updated the EACS LCAP and BOP on the website

- 3) Offered educational partner participation opportunities that consist of: Fall Parent Summit (breakout sessions for parents to meet and engage with EACS administrators and educators, and participate in parent education sessions), Spring Parent Power-Up (Spring PAC meeting, breakout sessions to build on student learning, student-centered activities for students in grades TK-12)
- 4) Offered "Coffee with the Principals" to provide school administrators with input about EACS that drives the LCAP development process
- 5) Hosted "Back to School" events across all regions to engage with students and families who are new or returning to EACS through a variety of activities and Q & A sessions
- 6) Met with NHS and Student Council, EACS' student advisory committee and leadership groups, to request feedback in order to identify student needs and actions to address needs
- 7) Held consistent staff meetings to review and analyze desegregated i-Ready, CAASPP, and Summative ELPAC data to determine the grade level needs within the domains, as well as actions to assist students who are performing below grade level expectations
- 8) Surveyed staff members, parents, and students separately to gather feedback related to student needs and the potential actions to address the identified needs
- 9) Created the SPSA and mid-year LCAP using educational partner feedback which provided insight to update the LCAP
- 10) Shared collected and analyzed assessment data with educational partners, along with the collected survey results and testimonials to keep all partners aware of the input - data included SWD, SED, and EL students
- 11) Provided consistent communication throughout the school year to inform educational partners of upcoming meetings - Communication consisted of posting on Beehively (main communication platform), emails, phone calls, weekly memos and newsletters
- 12) LCAP was presented to the ELAC on May 22, 2024 and SSC on May 23, 2024 for input

EACS' input consisted of feedback provided by educational partners that assisted in the process of finalizing the LCAP. This year's input consisted of:

- 1) Providing opportunities for all students in grades K-11 to increase their i-Ready, CAASPP, and Summative ELPAC scores with additional guided test prep sessions and completion of practice tests
- 2) Focusing on strategies to support staff, student, and parent relationships - building stronger communication skills both in-person and through all available social media platforms, offering more parent education to assist parents at home
- 3) Increasing opportunities to: a) enhance participation at SSC, ELAC, and PAC meetings by focusing on cultural awareness and opportunities to spotlight students, b) participate in community events for all students, including high school students, by creating additional in person events across all regions
- 4) Implementing professional development for staff to stay abreast of: new policies and procedures within their departments (i.e. education, SPED, assessment, operations, and business services), state expectations, assessment analysis of all student groups, grade levels, and content within the ELA and math domains, new strategies to assist all student learning that supports the overall development of academic and social-emotional learning instruction, and strengthening staff leadership skills
- 5) Expanding learning opportunities for foster youth, EL, and socio-economically disadvantaged students  
Improving ELA and math performance for all students and build English proficiency for all EL students while monitoring the progress of LTEL (Long Term English Learner) students
- 6) Providing ongoing instructional support for all students falling one plus grade levels below grade level - providing additional resources, support, live classes, and tutoring
- 7) Focusing on: maintaining high ADA, A-G offered courses, high graduation rate, expanding CTE course offerings, low chronic absenteeism, and zero suspension and expulsion rates

8) Offering additional programs for students (i.e. implementation of the GATE program (with CoGAT8 testing) and the chess club

In response to the ongoing need that the educational partners identified, the feedback influenced the decision to focus on the four goals and actions that are aligned to each goal. Each action was individually addressed and assessed to ensure it is relevant to the current goal, mission, vision, and student learner outcomes identified by the school.

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
1	Excel Academy Charter School (EACS) will improve the academic achievement of all students, including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) by providing challenging and engaging curriculum and standards-based assessments in language arts and mathematics. Excel Academy will provide intensive, individualized support to students who have fallen below grade level and face significant challenges to success.	Broad Goal

### State Priorities addressed by this goal.

<p>Priority 1: Basic (Conditions of Learning)</p> <p>Priority 2: State Standards (Conditions of Learning)</p> <p>Priority 4: Pupil Achievement (Pupil Outcomes)</p> <p>Priority 7: Course Access (Conditions of Learning)</p>
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### An explanation of why the LEA has developed this goal.

<p><b>Broad Goal:</b>                  With a focus on supporting student achievement, the goal and our actions/services focus on monitoring each student's academic achievement. Continual monitoring of student data to identify struggling students and interventions is important to the success of our students and helps prevent learning gaps. The metrics we utilize to ensure students are on track for graduation include i-Ready, CAASPP, and ELPAC.</p>
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## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.1	CAASPP ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2023-2023 CAASPP data.  60% met or exceeded standards 22% nearly met standards 18% not met standards			Increase the number of students that have met or exceeded grade level proficiency by 2% each year, and continue to surpass both state	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
					and county test score percentages.	
1.2	CAASPP Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	A baseline will be developed from 2022-2023 CAASPP data.  48% met or exceeded standards 28% nearly met standards 24% not met standards			Increase the number of students that have met or exceeded grade level proficiency by 2% each year, and continue to surpass both state and county test score percentages.	
1.3	i-Ready ELA Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2024 i-Ready ELA Spring Scores ALL Tier 1: 72.2% Tier 2: 14.8% Tier 3: 13%  English Learners Tier 1: 50% Tier 2: 15% Tier 3: 35%  Economically Disadvantaged Tier 1: 66% Tier 2: 15% Tier 3: 19%  Students with IEPs Tier 1: 32% Tier 2: 19% Tier 3: 49%			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
1.4	i-Ready Math Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	2024 i-Ready Math Spring Scores ALL Tier 1: 63.1% Tier 2: 22.5% Tier 3: 14.3%  English Learners Tier 1: 43% Tier 2: 33% Tier 3: 24%  Economically Disadvantaged Tier 1: 58% Tier 2: 24% Tier 3: 19%  Students with IEPs Tier 1: 31% Tier 2: 20% Tier 3: 49%			Increase the number of students that have met or exceeded grade level proficiency by 2% each year.	
1.5	Increase ELPAC levels annually	A baseline will be developed from 2023-2024 Summative ELPAC data.			Increase number of RFEP students annually based on the Summative ELPAC score reports	
1.6	State Local Indicator Priority 2: State Standards: Implementation of State Standards and access to curriculum aligned instructional materials	Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline developed with local indicator outcomes			Implementation and Sustainability of the State Standards against the CDE State Standards Reflection Tool baseline	



Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
					developed with local indicator outcomes	
1.7	State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified and Effective Teachers, Teacher Credentialing	100% of teachers are appropriately credentialed for the courses they teach			100% of teachers are appropriately credentialed for the courses they teach	
1.8	State Local Indicator Basic Services: Conditions of Learning: Textbooks Availability of textbooks and other instructional materials	0% Students lacking textbooks and other instructional materials			0% Students lacking textbooks and other instructional materials	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
1.1	Student Achievement	1.1 Excel Academy will increase the academic achievement of all students by evaluating student assessments through in-depth data analysis to provide effective instruction, a challenging and engaging curriculum, and aligned assessments in language arts and mathematics through a database system that collects individual formative and summative data. Data collection and analysis includes statewide and internal assessments as measured by the CA Dashboard and accountability systems.		No
1.2	Student Monitoring	1.2 Monitor low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments to review student learner outcomes and ensure academic success as well as social and emotional wellness, or refer to the RTI, SST, or IEP team. Offer programs like the "What I Need" WIN intervention program to provide instruction and resources n to promote academic growth, in addition to social-emotional awareness classes and character building.		Yes
1.3	Broad Course of Study	1.3 All students have access to a broad course of study and materials/learning experiences aligned to Common Core Standards through multiple channels assisting students in completing standards-aligned content. (All Students) <ul style="list-style-type: none"> <li>• Online courses, credit recovery, core programs</li> <li>• Supplemental curriculum and materials supporting Common Core Standards</li> <li>• Extended School year</li> <li>• Curriculum aligned to Common Core</li> <li>• English Language Development (ELD) curriculum</li> </ul>	\$7,851,115.00	No

Action #	Title	Description	Total Funds	Contributing
1.4	Professional Development	1.4 Professional development opportunities for teachers and administrators to equip them with information and resources to better serve students and parents, for example, tools for goal setting and curriculum pacing, identifying, supporting, and monitoring students in the "What I Need" (WIN) and English Language Development (ELD) program. Professional development through organizations such as CSSA (California Charter School Association), CSDC (Charter School Development Center) and APLUS+.	\$50,831.00	No
1.5	Parent Training	1.5 Provide parent training, learning opportunities, and workshops on a variety of topics, for example, explaining EL progress and reclassification process during ELAC meetings, parent portal resources, webinars, curriculum menus, Parent Summit, Back to School events, and teacher parent training.		Yes
1.6	Grade Level Curriculum and Instruction	1.6 Students will be provided with instructional strategies connected to the grade-level curriculum to become creative and complex thinkers, effective communicators, community/global participants, and empowered independent learners.		No
1.7	Student Monitoring and Support	1.7 Identify, support, and monitor students performing one or more years below grade level through the "What I Need" (WIN) intervention program. Students are required to participate in weekly intervention programs that are monitored by the credentialed teacher. Students who are performing below grade level on the fall i-Ready assessments will have the opportunity to take the mid-year i-Ready assessment(s).	\$18,064.00	Yes
1.8	Needs Assessment - Data Analysis	1.8 Use data analysis and historical tracking of performance on internal and state testing to drive our policies, curriculum, and program decisions.	\$5,526.00	No

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
2	Excel Academy Charter School (EACS) will continue to promote a high ADA and a positive school climate by providing high-quality teachers, clear expectations, and frequent communication. With effective intervention and support, we ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) maintain active engagement to learn and improve their performance.	Maintenance of Progress Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 3: Parental Involvement (Engagement)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)

### An explanation of why the LEA has developed this goal.

#### Maintenance Goal:

We recognize that students who attend school regularly have been shown to be engaged, achieve at higher levels, and graduate from high school. The goal and actions/services are focused on student, family, and teacher engagement and connectedness to attain a high average daily attendance.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.1	Maintain or decrease chronic absenteeism rate of .01%	A baseline will be developed from 2023-2024 data			Continue to maintain or decrease Chronic Absenteeism rate of .01%	
2.2	Strive for 0% expulsion rate each year	0% Expulsion Rate			Maintain 0% expulsion rate each year	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
2.3	Strive for 0% suspension rate each year	0% Suspension Rate			Maintain 0% suspension rate each year	
2.4	State Local Indicator Basic Services: Conditions of Learning, State Priority: Basic Qualified/Effective Teachers	100% of teachers are appropriately credentialed for the courses they teach			100% of teachers are appropriately credentialed for the courses they teach	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
2.1	School Climate and Student Engagement	2.1 Focus on school climate and student engagement by providing families with a Master Agreement and Acknowledgement of Responsibilities (AOR) to maintain or improve our ADA by Progress Improvement Notification (PIN) policies and procedures, frequent check-ins and communication, and pacing guides.	\$33,936.00	No
2.2	Certificated and Classified Salaries and Benefits	2.2 Recruit and retain highly qualified multiple and single-subject teachers and classified staff, maintaining appropriate assignments and remaining competitive with salary and benefits.	\$99,220.00	No
2.3	Educational Partner Communication	2.3 Frequent communication with parents/students to notify them of school events, opportunities, and resources through Beehively, email, the school website, and social media platforms. We will build partnerships for student outcomes by sending notification of surveys, parent meetings, and Board of Directors public meetings in a timely manner to all families through emails, website, and other social media platforms while ensuring the participation and engagement of our underrepresented families.	\$19,950.00	No
2.4	Technology	2.4 Purchase technological devices and provide professional development to promote student engagement and develop 21st Century skills and support access to instruction as needed.	\$38,000.00	No
2.5	Professional Development	2.5 Professional development in cultural awareness.		No

# Goals and Actions

## Goal

Goal #	Description	Type of Goal
3	Excel Academy Charter School (EACS) will establish connections and partnerships with our families and community to increase engagement, involvement, and ensure safety and satisfaction to support student learning and achievement for all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs). Effective and meaningful transparent communication will provide all educational partners opportunities for input in decision making for policy and program improvement.	Maintenance of Progress Goal

State Priorities addressed by this goal.

- Priority 3: Parental Involvement (Engagement)
- Priority 5: Pupil Engagement (Engagement)
- Priority 6: School Climate (Engagement)

An explanation of why the LEA has developed this goal.

Maintenance Goal:  
 Establishing connections and partnerships in education with our students and parents correlates with students attending school more regularly, earning higher grades, and graduating from high school. Increasing the number and percentages of the input survey participants provides an opportunity to develop collaborative academic relationships with students, parents, and establish community partnerships.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.1	State Local Indicator Priority 3: Participation/Input Rates Survey Results Maintain or increase by 2% each year	Baseline set 2023-2024 Maintain or increase by 2%			Maintain or increase by 2%	



Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
3.2	<p>State Local Indicator Priority 6: Overall Satisfaction Rate Survey Results</p> <p>Maintain or increase by 2% each year</p>	<p>Overall Satisfaction Report: Based on 351 parent/guardian responses:</p> <p>98.6% of survey respondents agree that the school has supported students attaining their academic goals. (3% increase from 2023)</p> <p>98.3% of survey respondents overall agree that the school provides input opportunities for parents/guardians to participate in the school and their child's education. (2% increase from 2023)</p> <p>98.6% of survey respondents agree that students have access to rigorous curriculum and resources that allow them to access and master grade level standards in the core content areas. (0.2% increase from 2023)</p> <p>99.4% of survey respondents agree that</p>			<p>Maintain or increase by 2%</p>	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
		EACS clearly communicates academic expectations and encourages academic excellence in all forms of communication. (2% increase from 2023)				
3.3	Safety Plan Review and Training	Annual Review/Updates and Training Dates			Consistent plan and review process	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

## Actions

Action #	Title	Description	Total Funds	Contributing
3.1	Educational Partner Engagement	3.1 EACS will seek parent input and assess our level of educational partner engagement through parent participation in LP, ELAC, SSC, and PAC meetings, surveys, and Student Council, SARC and SPSA updates to identify our level of meaningful and transparent communication with all parents, and ensure all parents have opportunities for participation and input.		No
3.2	Educational Partner Partnerships	3.2 EACS will engage our educational partners in a meaningful and consistent manner through the monitoring of student performance and engaging parents in the participation of timely interventions to ensure student support and success.	\$253,994.00	Yes
3.3	School Climate	3.3 EACS will build relationships by ensuring that all parents, students, and teachers feel that our schools are providing a safe, positive, inclusive, and welcoming learning environment.	\$52,212.00	No
3.4	Student Services	3.4 EACS will properly vet all newly hired Content and Community Providers to ensure standards alignment and safety for our students.	\$35,951.00	No
3.5	School Climate and School Safety	3.5 EACS will continue to maintain a safe learning environment for all students by training the teachers and staff on school-wide safety plans.		No
3.6	Communication and Translating Services	3.6 EACS will provide notices, reports, statements, or records sent to a student, parent, or guardian will be translated as needed. Documents, records, and statements will be sent upon request by clerical staff.	\$0.00	Yes
3.7	School Operating Services	3.7 EACS' operations of the charter are maintained and controlled through the management, oversight, and provision of operating services by the Executive Director and school leadership team.		No



# Goals and Actions

## Goal

Goal #	Description	Type of Goal
4	Excel Academy Charter School (EACS) will ensure that all students including English Learners (EL), other unduplicated student groups, and students with disabilities (SWDs) are on-track to graduate from high school with increased access to expanded A-G course options, community college partnerships, and CTE pathways all aimed at preparing them for college and/or career and technical education readiness. Collaboration among all Educational Partners will help ensure proper support is in place to prepare high school students for required internal and state assessments.	Broad Goal

### State Priorities addressed by this goal.

- Priority 1: Basic (Conditions of Learning)
- Priority 2: State Standards (Conditions of Learning)
- Priority 4: Pupil Achievement (Pupil Outcomes)
- Priority 5: Pupil Engagement (Engagement)
- Priority 7: Course Access (Conditions of Learning)
- Priority 8: Other Pupil Outcomes (Pupil Outcomes)

### An explanation of why the LEA has developed this goal.

#### Broad Goal:

With a focus on supporting our students to achieve their goal of high school graduation and college and career preparedness, the goal and actions/services focuses on monitoring each student's progress toward graduation. The continual monitoring of student data to identify struggling students and interventions is important to the success of our students staying on-track with course completion and on course to graduation. Graduation rate, college/career preparedness, and CTE participation are all metrics we monitor to ensure students are on track to graduate and to achieve their post-graduation goals.

## Measuring and Reporting Results

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.1	Graduation Rate Dropout Rate	Develop a baseline from 2023-2024 data			Increase the graduation rate and decrease the dropout rate	

Metric #	Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
4.2	Access to a Broad Curriculum: Career Technical Education (CTE) Participation	Develop a baseline for CTE participants and UC/CSU preparedness			Increase the CTE participants and students who are UC/CSU prepared	
4.3	Access to a Broad Curriculum: College/Career Prepared Pupils enrolled in and completion of A-G courses required for UC/CSU Admission	Develop a baseline for students enrolled in and completion of A-G courses required for UC/CSU Admission			Increase number of students enrolled in A-G courses required for UC/CSU Admission	

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

# Actions

Action #	Title	Description	Total Funds	Contributing
4.1	College and Career Readiness and Career Technical Education	4.1 Consistent with California College and Career Indicators, develop a comprehensive College and Career readiness program for high school students that helps align student strengths and interests to post-secondary goals; continue to develop Career Technical Education (CTE) pathways to encourage CTE Completers to prepare students for the 21st century workforce and global competencies.	\$6,718.00	No
4.2	High School Graduation	4.2 Students transitioning from middle to high school will be monitored to keep students on-track to graduate from high school by monitoring attendance data, providing collective support from teachers for academic success, raising the academic bar, and fostering support to ease transition through middle and high school.	\$175,104.00	No
4.3	High School Curriculum and Instruction	4.3 Provide high-quality instruction and curriculum that promotes graduation and college and career readiness with academic interventions. Review and strengthen the high school curriculum to maintain an engaging and rigorous curriculum supporting graduation and college and career readiness.	\$518,700.00	No
4.4	Testing	4.4 Ensure all students have opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities.	\$15,436.00	Yes
4.5	Testing	4.5 Advanced Placement exam costs for low-income and foster youth who are experiencing financial hardship.		Yes
4.6	A-G and Career Technical Education Courses	4.6 Expand our A-G course offerings so that all students have access to graduate as A-G completers, and continue to build relationships with community colleges to promote college credit courses.	\$11,889.00	No



Action #	Title	Description	Total Funds	Contributing
4.7	Needs Assessment - Data Analysis	4.7 Analyze 8th-10th grade i-Ready score reports and 8th grade CAASPP data to ensure students are on track to succeed with high school-level coursework and prepare for the CAASPP assessments in 11th grade. Provide targeted interventions and resources to students identified as needing additional support.		No

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2024-25]

Total Projected LCFF Supplemental and/or Concentration Grants	Projected Additional 15 percent LCFF Concentration Grant
\$704,165	\$0.00

## Required Percentage to Increase or Improve Services for the LCAP Year

Projected Percentage to Increase or Improve Services for the Coming School Year	LCFF Carryover — Percentage	LCFF Carryover — Dollar	Total Percentage to Increase or Improve Services for the Coming School Year
9.035%	0.000%	\$0.00	9.035%

The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.

## Required Descriptions

### LEA-wide and Schoolwide Actions

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
1.2	<p><b>Action:</b> Student Monitoring</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b></p>	Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments is necessary to evaluate student progress and to identify areas of strength and needs within ELA and math domains. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
	LEA-wide	academic growth, in addition to social-emotional awareness classes and character building.	
1.5	<p><b>Action:</b> Parent Training</p> <p><b>Need:</b> Parents - Home Educators</p> <p><b>Scope:</b> LEA-wide</p>	Providing parent training, learning opportunities, and workshops on a variety of topics will guide parents to provide the best educational support at home for their students.	Survey results Student academic progress and growth monitoring - assessments, learning period meeting attendance and work samples
1.7	<p><b>Action:</b> Student Monitoring and Support</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> LEA-wide</p>	Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments will provide the appropriate data to review student learner outcomes and provide students with the appropriate resources and interventions to meet grade level expectations. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students
3.2	<p><b>Action:</b> Educational Partner Partnerships</p> <p><b>Need:</b> Administrators, teachers, staff, parents, students, governing board, community/public</p> <p><b>Scope:</b> LEA-wide</p>	Engaging EACS educational partners in an intentional, meaningful, and consistent manner by monitoring student performance and providing timely interventions will help promote growth and success for students to meet their individual goals and meet or exceed grade level expectations.	i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams

Goal and Action #	Identified Need(s)	How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis	Metric(s) to Monitor Effectiveness
			Growth and progress analysis from the teachers assigned to the students
3.6	<p><b>Action:</b> Communication and Translating Services</p> <p><b>Need:</b> Educational Partners - Parents, guardians, students</p> <p><b>Scope:</b> LEA-wide</p>	Ongoing communication in English and in the students' home language (upon request) keeps an open line of communication to better support individual student needs and keeps educational partners aware of policies, procedures, events, important notices, etc. that guide student learning.	Survey responses Teacher feedback Department lead feedback Attendance at school events
4.4	<p><b>Action:</b> Testing</p> <p><b>Need:</b> All students including low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> LEA-wide</p>	Ensuring that all students have the opportunity for intensive CAASPP preparation, specifically low income, EL, foster-youth students, and students with disabilities, sets students up for success on the state assessments. CAASPP preparation includes oversight from assigned teacher to make sure the students are paced properly with their ELA and math curriculum, have intervention support if needed, tutoring support if needed, access to test prep packets, live test prep sessions with EACS teachers, and state practice tests.	Director of Assessment and Accountability Feedback Intervention Department Feedback Teacher Feedback CAASPP test scores
4.5	<p><b>Action:</b> Testing</p> <p><b>Need:</b> Low-income pupils and foster youth</p> <p><b>Scope:</b> LEA-wide</p>	Providing advanced placement exam costs for low-income and foster youth who are experiencing financial hardship provides students with the necessary support to complete exams.	Admission Team and High School Principal Feedback

**Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

Goal and Action #	Identified Need(s)	How the Action(s) are Designed to Address Need(s)	Metric(s) to Monitor Effectiveness
1.2	<p><b>Action:</b> Student Monitoring</p> <p><b>Need:</b> Low-income pupils, foster youth, English Learners, Long Term English Learners, and students with disabilities</p> <p><b>Scope:</b> Limited to Unduplicated Student Group(s)</p>	<p>Monitoring low-income pupils, foster youth, English Learners, and students with disabilities for proficiency on state and local assessments is necessary to evaluate student progress and to identify areas of strength and needs withing ELA and math domains. The SST and IEP teams will review student learner outcomes and set goals to ensure academic success as well as social and emotional wellness. EACS will offer programs like the "What I Need" WIN intervention program to provide instruction and resources to promote academic growth, in addition to social-emotional awareness classes and character building.</p>	<p>i-Ready Diagnostic Benchmark Assessment, CAASPP, and Summative ELPAC assessment results Documentation of progress from the SST and IEP teams Growth and progress analysis from the teachers assigned to the students</p>

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

Services for our low-income, English Learners, and foster youth are targeted interventions that were identified through a collaborative effort with the school’s Executive Director, Director of Assessment and Accountability, Assistant Director of Intervention, High School Principal, and High School Counselors. The goals and actions in the LCAP are focused on increasing services and improving the quality of the academic support to improve student performance, educational partner engagement, and the level of college and career readiness of our student groups. Through a collaborative effort, the school leadership team, taking into account the feedback provided from all educational partners, identified the next steps to growth towards each of our goals. We expect to see improvement in student engagement and achievement as reflected in i-Ready and CAASPP test scores, and an increase in our graduation and college and career readiness rate.

### **Additional Concentration Grant Funding**

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

<b>Staff-to-student ratios by type of school and concentration of unduplicated students</b>	Schools with a student concentration of 55 percent or less	Schools with a student concentration of greater than 55 percent
Staff-to-student ratio of classified staff providing direct services to students	N/A	N/A
Staff-to-student ratio of certificated staff providing direct services to students	N/A	N/A

# 2024-25 Total Expenditures Table

LCAP Year	1. Projected LCFF Base Grant (Input Dollar Amount)	2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Input Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)
Totals	7,793,902	704,165	9.035%	0.000%	9.035%

Totals	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds	Total Personnel	Total Non-personnel
Totals	\$7,742,341.00	\$1,174,753.00	\$76,000.00	\$193,552.00	\$9,186,646.00	\$5,868,437.00	\$3,318,209.00

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
1	1.1	Student Achievement	All	No				2022-25							
1	1.2	Student Monitoring	English Foster Low Learners Youth Income	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools	2022-25							
1	1.3	Broad Course of Study	All	No				2022-25	\$5,214,600.00	\$2,636,515.00	\$6,531,120.00	\$1,080,564.00	\$76,000.00	\$163,431.00	\$7,851,115.00
1	1.4	Professional Development	All	No				2022-25	\$6,769.00	\$44,062.00		\$35,530.00		\$15,301.00	\$50,831.00
1	1.5	Parent Training	English Foster Low Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25							
1	1.6	Grade Level Curriculum and Instruction	All	No				2022-25							
1	1.7	Student Monitoring and Support	English Foster Low Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25	\$14,820.00	\$3,244.00		\$3,244.00		\$14,820.00	\$18,064.00
1	1.8	Needs Assessment - Data Analysis	All	No				2022-25	\$0.00	\$5,526.00		\$5,526.00			\$5,526.00
2	2.1	School Climate and Student Engagement	All	No				2022-25	\$33,936.00	\$0.00	\$33,936.00				\$33,936.00



Goal #	Action #	Action Title	Student Group(s)		Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
2	2.2	Certificated and Classified Salaries and Benefits	All		No				2022-25	\$99,220.00	\$0.00	\$99,220.00				\$99,220.00
2	2.3	Educational Partner Communication	All		No				2022-25	\$0.00	\$19,950.00	\$19,950.00				\$19,950.00
2	2.4	Technology	All		No				2022-25	\$0.00	\$38,000.00		\$38,000.00			\$38,000.00
2	2.5	Professional Development	All		No				2022-25							
3	3.1	Educational Partner Engagement	All		No				2022-25							
3	3.2	Educational Partner Partnerships	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25	\$253,994.00	\$0.00	\$253,994.00				\$253,994.00
3	3.3	School Climate	All		No				2022-25	\$0.00	\$52,212.00	\$52,212.00				\$52,212.00
3	3.4	Student Services	All		No				2022-25	\$35,951.00	\$0.00	\$35,951.00				\$35,951.00
3	3.5	School Climate and School Safety	All		No				2022-25							
3	3.6	Communication and Translating Services	English	Learners	Yes	LEA-wide	English Learners	All Schools	2022-25	\$0.00	\$0.00	\$0.00				\$0.00
3	3.7	School Operating Services	All		No				2022-25							
4	4.1	College and Career Readiness and Career Technical Education	All		No				2022-25	\$6,718.00	\$0.00	\$6,718.00				\$6,718.00
4	4.2	High School Graduation	All		No				2022-25	\$175,104.00	\$0.00	\$175,104.00				\$175,104.00
4	4.3	High School Curriculum and Instruction	All		No				2022-25	\$0.00	\$518,700.00	\$518,700.00				\$518,700.00
4	4.4	Testing	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25	\$15,436.00	\$0.00	\$15,436.00				\$15,436.00
4	4.5	Testing	English Foster Low	Learners Youth Income	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	2022-25							

Goal #	Action #	Action Title	Student Group(s)	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Time Span	Total Personnel	Total Non-personnel	LCFF Funds	Other State Funds	Local Funds	Federal Funds	Total Funds
4	4.6	A-G and Career Technical Education Courses	All	No				2022-25	\$11,889.00	\$0.00		\$11,889.00			\$11,889.00
4	4.7	Needs Assessment - Data Analysis	All	No				2022-25							

# 2024-25 Contributing Actions Table

1. Projected LCFF Base Grant	2. Projected LCFF Supplemental and/or Concentration Grants	3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1)	LCFF Carryover — Percentage (Percentage from Prior Year)	Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %)	4. Total Planned Contributing Expenditures (LCFF Funds)	5. Total Planned Percentage of Improved Services (%)	Planned Percentage to Increase or Improve Services for the Coming School Year (4 divided by 1, plus 5)	Totals by Type	Total LCFF Funds
7,793,902	704,165	9.035%	0.000%	9.035%	\$269,430.00	0.000%	3.457 %	<b>Total:</b>	\$269,430.00
								<b>LEA-wide Total:</b>	\$269,430.00
								<b>Limited Total:</b>	\$0.00
								<b>Schoolwide Total:</b>	\$0.00

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
1	1.2	Student Monitoring	Yes	LEA-wide Limited to Unduplicated Student Group(s)	English Learners Foster Youth Low Income	All Schools		
1	1.5	Parent Training	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
1	1.7	Student Monitoring and Support	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		
3	3.2	Educational Partner Partnerships	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$253,994.00	
3	3.6	Communication and Translating Services	Yes	LEA-wide	English Learners	All Schools	\$0.00	
4	4.4	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools	\$15,436.00	

Goal	Action #	Action Title	Contributing to Increased or Improved Services?	Scope	Unduplicated Student Group(s)	Location	Planned Expenditures for Contributing Actions (LCFF Funds)	Planned Percentage of Improved Services (%)
4	4.5	Testing	Yes	LEA-wide	English Learners Foster Youth Low Income	All Schools		

# 2023-24 Annual Update Table

Totals	Last Year's Total Planned Expenditures (Total Funds)	Total Estimated Expenditures (Total Funds)
<b>Totals</b>	\$7,358,118.00	\$7,359,218.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
startcollapse					
1	1.1	Student Achievement	No		
1	1.2	Student Monitoring	Yes		
1	1.3	Broad Course of Study	No	\$6,267,670.00	\$6,147,379.00
1	1.4	Professional Development	No	\$49,640.00	\$42,382.00
1	1.5	Parent Training	Yes		
1	1.6	Grade Level Curriculum and Instruction	No		
1	1.7	Student Monitoring and Support	Yes	\$31,378.00	\$30,100.00
1	1.8	Needs Assessment - Data Analysis	No	\$4,945.00	\$4,945.00
2	2.1	School Climate and Student Engagement	No	\$27,922.00	\$27,166.00
2	2.2	Certificated and Classified Salaries and Benefits	No	\$83,136.00	\$97,962.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
2	2.3	Educational Partner Communication	No	\$12,488.00	\$12,488.00
2	2.4	Technology	No	\$68,000.00	\$47,709.00
2	2.5	Professional Development	No		
3	3.1	Educational Partner Engagement	No		
3	3.2	Educational Partner Partnerships	Yes	\$213,551.00	\$256,994.00
3	3.3	School Climate	No	\$33,870.00	\$32,150.00
3	3.4	Student Services	No	\$31,572.00	\$37,417.00
3	3.5	School Climate and School Safety	No		
3	3.6	Communication and Translating Services	Yes	\$3,250.00	\$3,250.00
3	3.7	School Operating Services	No		
4	4.1	College and Career Readiness and Career Technical Education	No	\$8,200.00	\$4,000.00
4	4.2	High School Graduation	No	\$107,374.00	\$163,410.00
4	4.3	High School Curriculum and Instruction	No	\$322,034.00	\$359,920.00

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributed to Increased or Improved Services?	Last Year's Planned Expenditures (Total Funds)	Estimated Actual Expenditures (Input Total Funds)
4	4.4	Testing	Yes	\$76,742.00	\$75,600.00
4	4.5	Testing	Yes		
4	4.6	A-G and Career Technical Education Courses	No	\$16,346.00	\$16,346.00
4	4.7	Needs Assessment - Data Analysis	No		



# 2023-24 Contributing Actions Annual Update Table

6. Estimated LCFF Supplemental and/or Concentration Grants (Input Dollar Amount)	4. Total Planned Contributing Expenditures (LCFF Funds)	7. Total Estimated Expenditures for Contributing Actions (LCFF Funds)	Difference Between Planned and Estimated Expenditures for Contributing Actions (Subtract 7 from 4)	5. Total Planned Percentage of Improved Services (%)	8. Total Estimated Percentage of Improved Services (%)	Difference Between Planned and Estimated Percentage of Improved Services (Subtract 5 from 8)
\$621,189.00	\$309,496.00	\$352,939.00	(\$43,443.00)	0.000%	0.000%	0.000%

Last Year's Goal #	Last Year's Action #	Prior Action/Service Title	Contributing to Increased or Improved Services?	Last Year's Planned Expenditures for Contributing Actions (LCFF Funds)	Estimated Actual Expenditures for Contributing Actions (Input LCFF Funds)	Planned Percentage of Improved Services	Estimated Actual Percentage of Improved Services (Input Percentage)
startcol	lapse						
1	1.2	Student Monitoring	Yes				
1	1.5	Parent Training	Yes				
1	1.7	Student Monitoring and Support	Yes	\$15,953.00	\$15,953.00		
3	3.2	Educational Partner Partnerships	Yes	\$213,551.00	\$256,994.00		
3	3.6	Communication and Translating Services	Yes	\$3,250.00	\$3,250.00		
4	4.4	Testing	Yes	\$76,742.00	\$76,742.00		
4	4.5	Testing	Yes				

To Add a Row: Click "Add Row."

To Delete a Row: Remove all content from each cell, checkbox and dropdown of a row (including spaces), press "Save Data" and refresh the page.

# 2023-24 LCFF Carryover Table

9. Estimated Actual LCFF Base Grant (Input Dollar Amount)	6. Estimated Actual LCFF Supplemental and/or Concentration Grants	LCFF Carryover — Percentage (Percentage from Prior Year)	10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %)	7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds)	8. Total Estimated Actual Percentage of Improved Services (%)	11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)	12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9)	13. LCFF Carryover — Percentage (12 divided by 9)
	\$621,189.00	0.00	0.000%	\$352,939.00	0.000%	0.000%	\$0.00	0.000%

# Local Control and Accountability Plan Instructions

## [Plan Summary](#)

## [Engaging Educational Partners](#)

## [Goals and Actions](#)

## [Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students](#)

For additional questions or technical assistance related to the completion of the Local Control and Accountability Plan (LCAP) template, please contact the local county office of education (COE), or the California Department of Education's (CDE's) Local Agency Systems Support Office, by phone at 916-319-0809 or by email at [LCFF@cde.ca.gov](mailto:LCFF@cde.ca.gov).

## Introduction and Instructions

The Local Control Funding Formula (LCFF) requires local educational agencies (LEAs) to engage their local educational partners in an annual planning process to evaluate their progress within eight state priority areas encompassing all statutory metrics (COEs have 10 state priorities). LEAs document the results of this planning process in the LCAP using the template adopted by the State Board of Education.

The LCAP development process serves three distinct, but related functions:

- **Comprehensive Strategic Planning:** The process of developing and annually updating the LCAP supports comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (California *Education Code* [EC] Section 52064[e][1]). Strategic planning that is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students.
- **Meaningful Engagement of Educational Partners:** The LCAP development process should result in an LCAP that reflects decisions made through meaningful engagement (EC Section 52064[e][1]). Local educational partners possess valuable perspectives and insights about an LEA's programs and services. Effective strategic planning will incorporate these perspectives and insights in order to identify potential goals and actions to be included in the LCAP.
- **Accountability and Compliance:** The LCAP serves an important accountability function because the nature of some LCAP template sections require LEAs to show that they have complied with various requirements specified in the LCFF statutes and regulations, most notably:
  - Demonstrating that LEAs are increasing or improving services for foster youth, English learners, including long-term English learners, and low-income students in proportion to the amount of additional funding those students generate under LCFF (EC Section 52064[b][4-6]).
  - Establishing goals, supported by actions and related expenditures, that address the statutory priority areas and statutory metrics (EC sections 52064[b][1] and [2]).
    - **NOTE:** As specified in EC Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to EC Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, EC

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (*EC* sections 52064[b][6], [8], and [11]).

The LCAP template, like each LEA's final adopted LCAP, is a document, not a process. LEAs must use the template to memorialize the outcome of their LCAP development process, which must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (b) through meaningful engagement with educational partners that (c) meets legal requirements, as reflected in the final adopted LCAP. The sections included within the LCAP template do not and cannot reflect the full development process, just as the LCAP template itself is not intended as a tool for engaging educational partners.

If a county superintendent of schools has jurisdiction over a single school district, the county board of education and the governing board of the school district may adopt and file for review and approval a single LCAP consistent with the requirements in *EC* sections 52060, 52062, 52066, 52068, and 52070. The LCAP must clearly articulate to which entity's budget (school district or county superintendent of schools) all budgeted and actual expenditures are aligned.

The revised LCAP template for the 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023.

At its most basic, the adopted LCAP should attempt to distill not just what the LEA is doing for students in transitional kindergarten through grade twelve (TK–12), but also allow educational partners to understand why, and whether those strategies are leading to improved opportunities and outcomes for students. LEAs are strongly encouraged to use language and a level of detail in their adopted LCAPs intended to be meaningful and accessible for the LEA's diverse educational partners and the broader public.

In developing and finalizing the LCAP for adoption, LEAs are encouraged to keep the following overarching frame at the forefront of the strategic planning and educational partner engagement functions:

Given present performance across the state priorities and on indicators in the Dashboard, how is the LEA using its budgetary resources to respond to TK–12 student and community needs, and address any performance gaps, including by meeting its obligation to increase or improve services for foster youth, English learners, and low-income students?

LEAs are encouraged to focus on a set of metrics and actions which, based on research, experience, and input gathered from educational partners, the LEA believes will have the biggest impact on behalf of its TK–12 students.

These instructions address the requirements for each section of the LCAP, but may include information about effective practices when developing the LCAP and completing the LCAP document. Additionally, the beginning of each template section includes information emphasizing the purpose that section serves.

# Plan Summary

## Purpose

A well-developed Plan Summary section provides a meaningful context for the LCAP. This section provides information about an LEA's community as well as relevant information about student needs and performance. In order to present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

## Requirements and Instructions

### General Information

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

Briefly describe the LEA, its schools, and its students in grades TK–12, as applicable to the LEA.

- For example, information about an LEA in terms of geography, enrollment, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

### Reflections: Annual Performance

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

### Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as “Not Applicable.”

### **Comprehensive Support and Improvement**

An LEA with a school or schools identified for comprehensive support and improvement (CSI) under the Every Student Succeeds Act must respond to the following prompts:

#### Schools Identified

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

#### Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- Describe how the LEA has or will support the identified schools in developing CSI plans that included a school-level needs assessment, evidence-based interventions, and the identification of any resource inequities to be addressed through the implementation of the CSI plan.

#### Monitoring and Evaluating Effectiveness

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- Describe how the LEA will monitor and evaluate the implementation and effectiveness of the CSI plan to support student and school improvement.

## **Engaging Educational Partners**

### **Purpose**

Significant and purposeful engagement of parents, students, educators, and other educational partners, including those representing the student groups identified by LCFF, is critical to the development of the LCAP and the budget process. Consistent with statute, such engagement should support comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, accountability, and improvement across the state priorities and locally identified priorities (*EC* Section 52064[e][1]). Engagement of educational partners is an ongoing, annual process.

This section is designed to reflect how the engagement of educational partners influenced the decisions reflected in the adopted LCAP. The goal is to allow educational partners that participated in the LCAP development process and the broader public to understand how the LEA engaged educational partners and the impact of that engagement. LEAs are encouraged to keep this goal in the forefront when completing this section.

### **Requirements**

**School districts and COEs:** *EC* sections [52060\(g\) \(California Legislative Information\)](#) and [52066\(g\) \(California Legislative Information\)](#) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. The superintendent is required by statute to respond in writing to the comments received from these committees. School districts and COEs must also consult with the special education local plan area administrator(s) when developing the LCAP.

**Charter schools:** *EC* Section [47606.5\(d\) \(California Legislative Information\)](#) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

The LCAP should also be shared with, and LEAs should request input from, schoolsite-level advisory groups, as applicable (e.g., schoolsite councils, English Learner Advisory Councils, student advisory groups, etc.), to facilitate alignment between schoolsite and district-level goals. Information and resources that support effective engagement, define student consultation, and provide the requirements for advisory group composition, can be found under Resources on the [CDE's LCAP webpage](#).

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see [Education Code Section 52062 \(California Legislative Information\)](#);
  - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).



- For COEs, see [Education Code Section 52068 \(California Legislative Information\)](#); and
- For charter schools, see [Education Code Section 47606.5 \(California Legislative Information\)](#).
- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

## Instructions

### Respond to the prompts as follows:

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

### Complete the table as follows:

#### Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

#### Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it met its obligation to consult with all statutorily required educational partners, as applicable to the type of LEA.

- A sufficient response to this prompt must include general information about the timeline of the process and meetings or other engagement strategies with educational partners. A response may also include information about an LEA's philosophical approach to engaging its educational partners.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- A sufficient response to this prompt will provide educational partners and the public with clear, specific information about how the engagement process influenced the development of the LCAP. This may include a description of how the LEA prioritized requests of educational partners within the context of the budgetary resources available or otherwise prioritized areas of focus within the LCAP.
- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.
- For the purposes of this prompt, this may also include, but is not necessarily limited to:
  - Inclusion of a goal or decision to pursue a Focus Goal (as described below)
  - Inclusion of metrics other than the statutorily required metrics
  - Determination of the target outcome on one or more metrics
  - Inclusion of performance by one or more student groups in the Measuring and Reporting Results subsection
  - Inclusion of action(s) or a group of actions
  - Elimination of action(s) or group of actions
  - Changes to the level of proposed expenditures for one or more actions
  - Inclusion of action(s) as contributing to increased or improved services for unduplicated students
  - Analysis of effectiveness of the specific actions to achieve the goal
  - Analysis of material differences in expenditures
  - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
  - Analysis of challenges or successes in the implementation of actions

## Goals and Actions

### Purpose

Well-developed goals will clearly communicate to educational partners what the LEA plans to accomplish, what the LEA plans to do in order to accomplish the goal, and how the LEA will know when it has accomplished the goal. A goal statement, associated metrics and expected outcomes, and the actions included in the goal must be in alignment. The explanation for why the LEA included a goal is an opportunity for LEAs to clearly communicate to educational partners and the public why, among the various strengths and areas for improvement highlighted by performance data and strategies and actions that could be pursued, the LEA decided to pursue this goal, and the related metrics, expected outcomes, actions, and expenditures.

A well-developed goal can be focused on the performance relative to a metric or metrics for all students, a specific student group(s), narrowing performance gaps, or implementing programs or strategies expected to impact outcomes. LEAs should assess the performance of their student groups when developing goals and the related actions to achieve such goals.

### Requirements and Instructions

LEAs should prioritize the goals, specific actions, and related expenditures included within the LCAP within one or more state priorities. LEAs must consider performance on the state and local indicators, including their locally collected and reported data for the local indicators that are included in the Dashboard, in determining whether and how to prioritize its goals within the LCAP. As previously stated, strategic planning that

is comprehensive connects budgetary decisions to teaching and learning performance data. LEAs should continually evaluate the hard choices they make about the use of limited resources to meet student and community needs to ensure opportunities and outcomes are improved for all students, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

In order to support prioritization of goals, the LCAP template provides LEAs with the option of developing three different kinds of goals:

- **Focus Goal:** A Focus Goal is relatively more concentrated in scope and may focus on a fewer number of metrics to measure improvement. A Focus Goal statement will be time bound and make clear how the goal is to be measured.
  - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- **Broad Goal:** A Broad Goal is relatively less concentrated in its scope and may focus on improving performance across a wide range of metrics.
- **Maintenance of Progress Goal:** A Maintenance of Progress Goal includes actions that may be ongoing without significant changes and allows an LEA to track performance on any metrics not addressed in the other goals of the LCAP.

### Requirement to Address the LCFF State Priorities

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The [LCFF State Priorities Summary](#) provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

#### Focus Goal(s)

##### Description

The description provided for a Focus Goal must be specific, measurable, and time bound.

- An LEA develops a Focus Goal to address areas of need that may require or benefit from a more specific and data intensive approach.
- The Focus Goal can explicitly reference the metric(s) by which achievement of the goal will be measured and the time frame according to which the LEA expects to achieve the goal.

##### Type of Goal

Identify the type of goal being implemented as a Focus Goal.

##### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

##### An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.

### Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding

#### Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

- (A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and
- (B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.
- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
  - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
  - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

#### Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

#### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

#### An explanation of why the LEA has developed this goal.

Explain why the LEA has chosen to prioritize this goal.

- An explanation must be based on Dashboard data or other locally collected data.
- LEAs must describe how the LEA identified this goal for focused attention, including relevant consultation with educational partners.
- LEAs are encouraged to promote transparency and understanding around the decision to pursue a focus goal.
- In addition to this information, the LEA must also identify:
  - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

**Note:** EC Section [42238.024\(b\)\(1\) \(California Legislative Information\)](#) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

## Broad Goal

### Description

Describe what the LEA plans to achieve through the actions included in the goal.

- The description of a broad goal will be clearly aligned with the expected measurable outcomes included for the goal.
- The goal description organizes the actions and expected outcomes in a cohesive and consistent manner.
- A goal description is specific enough to be measurable in either quantitative or qualitative terms. A broad goal is not as specific as a focus goal. While it is specific enough to be measurable, there are many different metrics for measuring progress toward the goal.

### Type of Goal

Identify the type of goal being implemented as a Broad Goal.

### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain why the LEA developed this goal and how the actions and metrics grouped together will help achieve the goal.

### **Maintenance of Progress Goal**

#### Description

Describe how the LEA intends to maintain the progress made in the LCFF State Priorities not addressed by the other goals in the LCAP.

- Use this type of goal to address the state priorities and applicable metrics not addressed within the other goals in the LCAP.
- The state priorities and metrics to be addressed in this section are those for which the LEA, in consultation with educational partners, has determined to maintain actions and monitor progress while focusing implementation efforts on the actions covered by other goals in the LCAP.

#### Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

#### State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

### **Measuring and Reporting Results:**

For each LCAP year, identify the metric(s) that the LEA will use to track progress toward the expected outcomes.

- LEAs must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- The metrics may be quantitative or qualitative; but at minimum, an LEA's LCAP must include goals that are measured using all of the applicable metrics for the related state priorities, in each LCAP year, as applicable to the type of LEA.
- To the extent a state priority does not specify one or more metrics (e.g., implementation of state academic content and performance standards), the LEA must identify a metric to use within the LCAP. For these state priorities, LEAs are encouraged to use metrics based on or reported through the relevant local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
  - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
  
- **Required metrics for Equity Multiplier goals:** For each Equity Multiplier goal, the LEA must identify:
  - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
  - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

Complete the table as follows:

Metric #
<ul style="list-style-type: none"> <li>● Enter the metric number.</li> </ul>
Metric
<ul style="list-style-type: none"> <li>● Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.</li> </ul>
Baseline
<ul style="list-style-type: none"> <li>● Enter the baseline when completing the LCAP for 2024–25.                             <ul style="list-style-type: none"> <li>○ Use the most recent data associated with the metric available at the time of adoption of the LCAP for the first year of the three-year plan. LEAs may use data as reported on the 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (e.g., high school graduation rate).</li> <li>○ Using the most recent data available may involve reviewing data the LEA is preparing for submission to the California Longitudinal Pupil Achievement Data System (CALPADS) or data that the LEA has recently submitted to CALPADS.</li> <li>○ Indicate the school year to which the baseline data applies.</li> <li>○ The baseline data must remain unchanged throughout the three-year LCAP.                                     <ul style="list-style-type: none"> <li>▪ This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain</li> </ul> </li> </ul> </li> </ul>



accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.

- If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.
- Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

## Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
  - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

## Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.
  - Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

## Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
  - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

## Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
  - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the **Measuring and Reporting Results** part of the Goal.

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Target for Year 3 Outcome	Current Difference from Baseline
Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2025–26</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2026–27</b> . Leave blank until then.	Enter information in this box when completing the LCAP for <b>2024–25</b> or when adding a new metric.	Enter information in this box when completing the LCAP for <b>2025–26</b> and <b>2026–27</b> . Leave blank until then.

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. “Effective” means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

**Note:** When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as “Not Applicable.”

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
  - Include a discussion of relevant challenges and successes experienced with the implementation process.
  - This discussion must include any instance where the LEA did not implement a planned action or implemented a planned action in a manner that differs substantively from how it was described in the adopted LCAP.

An explanation of material differences between Budgeted Expenditures and Estimated Actual Expenditures and/or Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services.

- Explain material differences between Budgeted Expenditures and Estimated Actual Expenditures and between the Planned Percentages of Improved Services and Estimated Actual Percentages of Improved Services, as applicable. Minor variances in expenditures or percentages do not need to be addressed, and a dollar-for-dollar accounting is not required.

## A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
  - In some cases, not all actions in a goal will be intended to improve performance on all of the metrics associated with the goal.
  - When responding to this prompt, LEAs may assess the effectiveness of a single action or group of actions within the goal in the context of performance on a single metric or group of specific metrics within the goal that are applicable to the action(s). Grouping actions with metrics will allow for more robust analysis of whether the strategy the LEA is using to impact a specified set of metrics is working and increase transparency for educational partners. LEAs are encouraged to use such an approach when goals include multiple actions and metrics that are not closely associated.
  - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

## A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- Describe any changes made to this goal, expected outcomes, metrics, or actions to achieve this goal as a result of this analysis and analysis of the data provided in the Dashboard or other local data, as applicable.
  - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:
    - The reasons for the ineffectiveness, and
    - How changes to the action will result in a new or strengthened approach.

### **Actions:**

Complete the table as follows. Add additional rows as necessary.

#### Action #

- Enter the action number.

#### Title

- Provide a short title for the action. This title will also appear in the action tables.

#### Description

- Provide a brief description of the action.

- For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.
- As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
- These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

## Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

## Contributing

- Indicate whether the action contributes to meeting the increased or improved services requirement as described in the Increased or Improved Services section using a “Y” for Yes or an “N” for No.
  - **Note:** for each such contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 CCR] Section 15496 in the Increased or Improved Services section of the LCAP.

**Actions for Foster Youth:** School districts, COEs, and charter schools that have a numerically significant foster youth student subgroup are encouraged to include specific actions in the LCAP designed to meet needs specific to foster youth students.

## Required Actions

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:
  - Language acquisition programs, as defined in *EC* Section 306, provided to students, and
  - Professional development for teachers.
  - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.
- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
  - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
  - These required actions will be effective for the three-year LCAP cycle.

## Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students

### Purpose

A well-written Increased or Improved Services section provides educational partners with a comprehensive description, within a single dedicated section, of how an LEA plans to increase or improve services for its unduplicated students as defined in *EC* Section 42238.02 in grades TK–12 as compared to all students in grades TK–12, as applicable, and how LEA-wide or schoolwide actions identified for this purpose meet regulatory requirements. Descriptions provided should include sufficient detail yet be sufficiently succinct to promote a broader understanding of educational partners to facilitate their ability to provide input. An LEA’s description in this section must align with the actions included in the Goals and Actions section as contributing.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

### Statutory Requirements

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC* Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the “minimum proportionality percentage” or “MPP.” The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

To improve services means to grow services in quality and to increase services means to grow services in quantity. Services are increased or improved by those actions in the LCAP that are identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

## LEA-wide and Schoolwide Actions

In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all students.

- Conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.
- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

### For School Districts Only

Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

## Requirements and Instructions

Complete the tables as follows:

### Total Projected LCFF Supplemental and/or Concentration Grants

- Specify the amount of LCFF supplemental and concentration grant funds the LEA estimates it will receive in the coming year based on the number and concentration of foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

### Projected Additional 15 percent LCFF Concentration Grant

- Specify the amount of additional LCFF concentration grant add-on funding, as described in *EC* Section 42238.02, that the LEA estimates it will receive in the coming year.

### Projected Percentage to Increase or Improve Services for the Coming School Year

- Specify the estimated percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year as calculated pursuant to 5 *CCR* Section 15496(a)(7).

### LCFF Carryover — Percentage

- Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).

**LCFF Carryover — Dollar**

- Specify the LCFF Carryover — Dollar amount identified in the LCFF Carryover Table. If a carryover amount is not identified in the LCFF Carryover Table, specify an amount of zero (\$0).

**Total Percentage to Increase or Improve Services for the Coming School Year**

- Add the Projected Percentage to Increase or Improve Services for the Coming School Year and the Proportional LCFF Required Carryover Percentage and specify the percentage. This is the LEA’s percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the LCAP year, as calculated pursuant to 5 CCR Section 15496(a)(7).

**Required Descriptions:**

**LEA-wide and Schoolwide Actions**

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

**Identified Need(s)**

Provide an explanation of the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

**How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis**

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA’s unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, conclusory statements that a service will help achieve an expected outcome for the goal, without an explicit connection or further explanation as to how, are not sufficient.



- Further, simply stating that an LEA has a high enrollment percentage of a specific student group or groups does not meet the increased or improved services standard because enrolling students is not the same as serving students.

### **Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

**Note for COEs and Charter Schools:** In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

### **Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

### **Identified Need(s)**

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

### **How the Action(s) are Designed to Address Need(s)**

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

### **Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited action contributing to meeting the increased or improved services requirement that is associated with a Planned Percentage of Improved Services in the Contributing Summary Table rather than an expenditure of LCFF funds, describe the methodology that was used to determine the contribution of the action towards the proportional percentage, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.
- When identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

- For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

### **Additional Concentration Grant Funding**

A description of the plan for how the additional concentration grant add-on funding identified above will be used to increase the number of staff providing direct services to students at schools that have a high concentration (above 55 percent) of foster youth, English learners, and low-income students, as applicable.

An LEA that receives the additional concentration grant add-on described in *EC* Section 42238.02 is required to demonstrate how it is using these funds to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent as compared to the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is equal to or less than 55 percent. The staff who provide direct services to students must be certificated staff and/or classified staff employed by the LEA; classified staff includes custodial staff.

Provide the following descriptions, as applicable to the LEA:

- An LEA that does not receive a concentration grant or the concentration grant add-on must indicate that a response to this prompt is not applicable.
- Identify the goal and action numbers of the actions in the LCAP that the LEA is implementing to meet the requirement to increase the number of staff who provide direct services to students at schools with an enrollment of unduplicated students that is greater than 55 percent.
- An LEA that does not have comparison schools from which to describe how it is using the concentration grant add-on funds, such as a single-school LEA or an LEA that only has schools with an enrollment of unduplicated students that is greater than 55 percent, must describe how it is using the funds to increase the number of credentialed staff, classified staff, or both, including custodial staff, who provide direct services to students at selected schools and the criteria used to determine which schools require additional staffing support.
- In the event that an additional concentration grant add-on is not sufficient to increase staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent, the LEA must describe how it is using the funds to retain staff providing direct services to students at a school with an enrollment of unduplicated students that is greater than 55 percent.

Complete the table as follows:

- Provide the staff-to-student ratio of classified staff providing direct services to students with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of classified staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
  - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.

- The staff-to-student ratio must be based on the number of full-time equivalent (FTE) staff and the number of enrolled students as counted on the first Wednesday in October of each year.
- Provide the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is 55 percent or less and the staff-to-student ratio of certificated staff providing direct services to students at schools with a concentration of unduplicated students that is greater than 55 percent, as applicable to the LEA.
  - The LEA may group its schools by grade span (Elementary, Middle/Junior High, and High Schools), as applicable to the LEA.
  - The staff-to-student ratio must be based on the number of FTE staff and the number of enrolled students as counted on the first Wednesday in October of each year.

## Action Tables

Complete the Total Planned Expenditures Table for each action in the LCAP. The information entered into this table will automatically populate the other Action Tables. Information is only entered into the Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover Table. The word “input” has been added to column headers to aid in identifying the column(s) where information will be entered. Information is not entered on the remaining Action tables.

The following tables are required to be included as part of the LCAP adopted by the local governing board or governing body:

- Table 1: Total Planned Expenditures Table (for the coming LCAP Year)
- Table 2: Contributing Actions Table (for the coming LCAP Year)
- Table 3: Annual Update Table (for the current LCAP Year)
- Table 4: Contributing Actions Annual Update Table (for the current LCAP Year)
- Table 5: LCFF Carryover Table (for the current LCAP Year)

Note: The coming LCAP Year is the year that is being planned for, while the current LCAP year is the current year of implementation. For example, when developing the 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

## Total Planned Expenditures Table

In the Total Planned Expenditures Table, input the following information for each action in the LCAP for that applicable LCAP year:

- **LCAP Year:** Identify the applicable LCAP Year.
- **1. Projected LCFF Base Grant:** Provide the total amount estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8).

Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated on the basis of the number and concentration of unduplicated students for the coming school year.
- **3. Projected Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected LCFF Base Grant and the Projected LCFF Supplemental and/or Concentration Grants, pursuant to 5 CCR Section 15496(a)(8). This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the coming LCAP year.
- **LCFF Carryover — Percentage:** Specify the LCFF Carryover — Percentage identified in the LCFF Carryover Table from the prior LCAP year. If a carryover percentage is not identified in the LCFF Carryover Table, specify a percentage of zero (0.00%).
- **Total Percentage to Increase or Improve Services for the Coming School Year:** This percentage will not be entered; it is calculated based on the Projected Percentage to Increase or Improve Services for the Coming School Year and the LCFF Carryover — Percentage. ***This is the percentage by which the LEA must increase or improve services for unduplicated pupils as compared to the services provided to all students in the coming LCAP year.***
- **Goal #:** Enter the LCAP Goal number for the action.
- **Action #:** Enter the action's number as indicated in the LCAP Goal.
- **Action Title:** Provide a title of the action.
- **Student Group(s):** Indicate the student group or groups who will be the primary beneficiary of the action by entering "All," or by entering a specific student group or groups.
- **Contributing to Increased or Improved Services?:** Type "Yes" if the action **is** included as contributing to meeting the increased or improved services requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.
- If "Yes" is entered into the Contributing column, then complete the following columns:
  - **Scope:** The scope of an action may be LEA-wide (i.e., districtwide, countywide, or charterwide), schoolwide, or limited. An action that is LEA-wide in scope upgrades the entire educational program of the LEA. An action that is schoolwide in scope upgrades the entire educational program of a single school. An action that is limited in its scope is an action that serves only one or more unduplicated student groups.

- **Unduplicated Student Group(s):** Regardless of scope, contributing actions serve one or more unduplicated student groups. Indicate one or more unduplicated student groups for whom services are being increased or improved as compared to what all students receive.
- **Location:** Identify the location where the action will be provided. If the action is provided to all schools within the LEA, the LEA must indicate “All Schools.” If the action is provided to specific schools within the LEA or specific grade spans only, the LEA must enter “Specific Schools” or “Specific Grade Spans.” Identify the individual school or a subset of schools or grade spans (e.g., all high schools or grades transitional kindergarten through grade five), as appropriate.
- **Time Span:** Enter “ongoing” if the action will be implemented for an indeterminate period of time. Otherwise, indicate the span of time for which the action will be implemented. For example, an LEA might enter “1 Year,” or “2 Years,” or “6 Months.”
- **Total Personnel:** Enter the total amount of personnel expenditures utilized to implement this action.
- **Total Non-Personnel:** This amount will be automatically calculated based on information provided in the Total Personnel column and the Total Funds column.
- **LCFF Funds:** Enter the total amount of LCFF funds utilized to implement this action, if any. LCFF funds include all funds that make up an LEA’s total LCFF target (i.e., base grant, grade span adjustment, supplemental grant, concentration grant, Targeted Instructional Improvement Block Grant, and Home-To-School Transportation).
  - **Note:** For an action to contribute towards meeting the increased or improved services requirement, it must include some measure of LCFF funding. The action may also include funding from other sources, however the extent to which an action contributes to meeting the increased or improved services requirement is based on the LCFF funding being used to implement the action.
- **Other State Funds:** Enter the total amount of Other State Funds utilized to implement this action, if any.
  - **Note:** Equity Multiplier funds must be included in the “Other State Funds” category, not in the “LCFF Funds” category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA’s LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.
- **Local Funds:** Enter the total amount of Local Funds utilized to implement this action, if any.
- **Federal Funds:** Enter the total amount of Federal Funds utilized to implement this action, if any.
- **Total Funds:** This amount is automatically calculated based on amounts entered in the previous four columns.
- **Planned Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis to unduplicated students, and that does not have funding associated with the action, enter the planned quality improvement anticipated for the action as

a percentage rounded to the nearest hundredth (0.00%). A limited action is an action that only serves foster youth, English learners, and/or low-income students.

- As noted in the instructions for the Increased or Improved Services section, when identifying a Planned Percentage of Improved Services, the LEA must describe the methodology that it used to determine the contribution of the action towards the proportional percentage. The percentage of improved services for an action corresponds to the amount of LCFF funding that the LEA estimates it would expend to implement the action if it were funded.

For example, an LEA determines that there is a need to analyze data to ensure that instructional aides and expanded learning providers know what targeted supports to provide to students who are foster youth. The LEA could implement this action by hiring additional staff to collect and analyze data and to coordinate supports for students, which, based on the LEA's current pay scale, the LEA estimates would cost \$165,000. Instead, the LEA chooses to utilize a portion of existing staff time to analyze data relating to students who are foster youth. This analysis will then be shared with site principals who will use the data to coordinate services provided by instructional assistants and expanded learning providers to target support to students. In this example, the LEA would divide the estimated cost of \$165,000 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

## Contributing Actions Table

As noted above, information will not be entered in the Contributing Actions Table; however, the 'Contributing to Increased or Improved Services?' column will need to be checked to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses.

## Annual Update Table

In the Annual Update Table, provide the following information for each action in the LCAP for the relevant LCAP year:

- **Estimated Actual Expenditures:** Enter the total estimated actual expenditures to implement this action, if any.

## Contributing Actions Annual Update Table

In the Contributing Actions Annual Update Table, check the 'Contributing to Increased or Improved Services?' column to ensure that only actions with a "Yes" are displaying. If actions with a "No" are displayed or if actions that are contributing are not displaying in the column, use the drop-down menu in the column header to filter only the "Yes" responses. Provide the following information for each contributing action in the LCAP for the relevant LCAP year:

- **6. Estimated Actual LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated based on the number and concentration of unduplicated students in the current school year.
- **Estimated Actual Expenditures for Contributing Actions:** Enter the total estimated actual expenditure of LCFF funds used to implement this action, if any.



- **Estimated Actual Percentage of Improved Services:** For any action identified as contributing, being provided on a Limited basis only to unduplicated students, and that does not have funding associated with the action, enter the total estimated actual quality improvement anticipated for the action as a percentage rounded to the nearest hundredth (0.00%).
  - Building on the example provided above for calculating the Planned Percentage of Improved Services, the LEA in the example implements the action. As part of the annual update process, the LEA reviews implementation and student outcome data and determines that the action was implemented with fidelity and that outcomes for foster youth students improved. The LEA reviews the original estimated cost for the action and determines that had it hired additional staff to collect and analyze data and to coordinate supports for students that estimated actual cost would have been \$169,500 due to a cost of living adjustment. The LEA would divide the estimated actual cost of \$169,500 by the amount of LCFF Funding identified in the Data Entry Table and then convert the quotient to a percentage. This percentage is the Estimated Actual Percentage of Improved Services for the action.

## LCFF Carryover Table

- **9. Estimated Actual LCFF Base Grant:** Provide the total amount of estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 CCR Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.
- **10. Total Percentage to Increase or Improve Services for the Current School Year:** This percentage will not be entered. The percentage is calculated based on the amounts of the Estimated Actual LCFF Base Grant (9) and the Estimated Actual LCFF Supplemental and/or Concentration Grants (6), pursuant to 5 CCR Section 15496(a)(8), plus the LCFF Carryover – Percentage from the prior year. This is the percentage by which services for unduplicated pupils must be increased or improved as compared to the services provided to all students in the current LCAP year.

## Calculations in the Action Tables

To reduce the duplication of effort of LEAs, the Action Tables include functionality such as pre-population of fields and cells based on the information provided in the Data Entry Table, the Annual Update Summary Table, and the Contributing Actions Table. For transparency, the functionality and calculations used are provided below.

### Contributing Actions Table

- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Planned Expenditures for Contributing Actions (LCFF Funds) column.
- **5. Total Planned Percentage of Improved Services**
  - This percentage is the total of the Planned Percentage of Improved Services column.
- **Planned Percentage to Increase or Improve Services for the coming school year (4 divided by 1, plus 5)**



- This percentage is calculated by dividing the Total Planned Contributing Expenditures (4) by the Projected LCFF Base Grant (1), converting the quotient to a percentage, and adding it to the Total Planned Percentage of Improved Services (5).

### **Contributing Actions Annual Update Table**

Pursuant to *EC* Section 42238.07(c)(2), if the Total Planned Contributing Expenditures (4) is less than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the LEA is required to calculate the difference between the Total Planned Percentage of Improved Services (5) and the Total Estimated Actual Percentage of Improved Services (7). If the Total Planned Contributing Expenditures (4) is equal to or greater than the Estimated Actual LCFF Supplemental and Concentration Grants (6), the Difference Between Planned and Estimated Actual Percentage of Improved Services will display “Not Required.”

- **6. Estimated Actual LCFF Supplemental and Concentration Grants**
  - This is the total amount of LCFF supplemental and concentration grants the LEA estimates it will actually receive based on of the number and concentration of unduplicated students in the current school year.
- **4. Total Planned Contributing Expenditures (LCFF Funds)**
  - This amount is the total of the Last Year's Planned Expenditures for Contributing Actions (LCFF Funds).
- **7. Total Estimated Actual Expenditures for Contributing Actions**
  - This amount is the total of the Estimated Actual Expenditures for Contributing Actions (LCFF Funds).
- **Difference Between Planned and Estimated Actual Expenditures for Contributing Actions (Subtract 7 from 4)**
  - This amount is the Total Estimated Actual Expenditures for Contributing Actions (7) subtracted from the Total Planned Contributing Expenditures (4).
- **5. Total Planned Percentage of Improved Services (%)**
  - This amount is the total of the Planned Percentage of Improved Services column.
- **8. Total Estimated Actual Percentage of Improved Services (%)**
  - This amount is the total of the Estimated Actual Percentage of Improved Services column.
- **Difference Between Planned and Estimated Actual Percentage of Improved Services (Subtract 5 from 8)**
  - This amount is the Total Planned Percentage of Improved Services (5) subtracted from the Total Estimated Actual Percentage of Improved Services (8).

### **LCFF Carryover Table**

- **10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 plus Carryover %)**

- This percentage is the Estimated Actual LCFF Supplemental and/or Concentration Grants (6) divided by the Estimated Actual LCFF Base Grant (9) plus the LCFF Carryover – Percentage from the prior year.

- **11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8)**

- This percentage is the Total Estimated Actual Expenditures for Contributing Actions (7) divided by the LCFF Funding (9), then converting the quotient to a percentage and adding the Total Estimated Actual Percentage of Improved Services (8).

- **12. LCFF Carryover — Dollar Amount LCFF Carryover (Subtract 11 from 10 and multiply by 9)**

- If the Estimated Actual Percentage of Increased or Improved Services (11) is less than the Estimated Actual Percentage to Increase or Improve Services (10), the LEA is required to carry over LCFF funds.

The amount of LCFF funds is calculated by subtracting the Estimated Actual Percentage to Increase or Improve Services (11) from the Estimated Actual Percentage of Increased or Improved Services (10) and then multiplying by the Estimated Actual LCFF Base Grant (9). This amount is the amount of LCFF funds that is required to be carried over to the coming year.

- **13. LCFF Carryover — Percentage (12 divided by 9)**

- This percentage is the unmet portion of the Percentage to Increase or Improve Services that the LEA must carry over into the coming LCAP year. The percentage is calculated by dividing the LCFF Carryover (12) by the LCFF Funding (9).

California Department of Education  
November 2023



Excel Academy Charter School-Helendale's estimated 2024-25 EPA entitlement is \$128,200. Staff proposes to code 100% of the EPA resource to certificated teaching staff salaries.

Group	Percentage of GF Cost per group	The percentage applied to EPA funds	Amount
Certificated Staff	100%	100%	\$128,200
<b>Total:</b>	<b>100%</b>	<b>100%</b>	<b>\$128,200</b>

**Proposed Expenditures by Function - Detail**

Certificated Positions			
Position	Number of Employees	SACS Function/Object	Cost
Classroom Teacher Salaries	1.25	1000/1100	\$128,200
<b>Totals</b>	<b>1.25</b>	<b>1000/1100</b>	<b>\$128,200</b>

The following summary shows the fiscal year 2025, 2026, and 2027 revenue and expenditure calculations:

Excel Academy Charter School - Helendale	
Education Protection Account Spending Summary	
<b>2024-25 Fiscal Year:</b>	
Final Education Protection Account (EPA) Revenues:	\$128,200
EPA Expenditures on Teacher Salaries & Benefits:	<b>\$128,200</b>
<b>Unspent 2024-25 EPA Revenues:</b>	-

<b>2025-26 Fiscal Year:</b>	
<i>Projected</i> Education Protection Account (EPA) Revenues:	\$129,482
EPA Expenditures on Teacher Salaries & Benefits:	<b>\$129,482</b>
<b>Unspent 2025-26 EPA Revenues:</b>	-
<b>2026-27 Fiscal Year:</b>	
<i>Projected</i> Education Protection Account (EPA) Revenues:	\$130,777
EPA Expenditures on Teacher Salaries & Benefits:	<b>\$130,777</b>
<b>Unspent 2026-27 EPA Revenues:</b>	-
<b>EPA Requirements Met in Each Year?</b>	<b>YES</b>



## **ACTION: HELENDALE - APPROVAL OF 2024-25 EPA PLAN**

### **BACKGROUND:**

Proposition 30, The Schools and Local Public Safety Protection Account of 2012, approved by the voters on November 6, 2012, temporarily increases the state's sales tax rate for all taxpayers and the personal income tax rates for upper-income taxpayers.

Proposition 30 provides that all K-14 local agencies have the sole authority to determine how the funds received from the EPA are spent, but with these provisions:

- The spending plan must be approved by the governing board during a public meeting. ● EPA funds cannot be used for the salaries or benefits of administrators or any other administrative costs. (See the list of functions on the CDE website referenced below for which EPA funds may be used.)
- Each year, the local agency must publish on its website an accounting of how much money was received from the EPA and how the funds were expended.

The revenues generated from Proposition 30 are deposited into a state account called the Education Protection Account (EPA). School districts, county offices of education, and charter schools (LEAs) will receive funds from the EPA based on their proportionate share of the statewide revenue limit amount. A corresponding reduction is made to an LEA's revenue limit EPA entitlement. LEAs received EPA payments quarterly beginning with the 2013-14 Fiscal Year.

In November 2016, the Proposition 55 Tax extension amended Proposition 30, providing continued allocation. Of the revenues generated from Section 36 of Article XIII EPA funds, 89 percent are provided to K-12 Education and 11 percent to community colleges.

It is proposed that EPA funds be used to cover non-administrative certificated staff's salary and benefit costs. Their share of costs determines the percentage of funds used per group to the general fund. The salaries below are calculated assuming no furlough days and/or salary rollbacks. Any difference in revenue and/or expenditures will be adjusted in teacher salaries (function 1000; object 1100).

For frequently asked questions about EPA, please refer to the California Department of Education’s website at <http://www.cde.ca.gov/fg/aa/pa/pafaq.asp>.

**CURRENT CONSIDERATIONS:**

Excel Academy Charter School's estimated 2024-25 EPA entitlement is \$128,200 Helendale. The staff has coded 100% of the EPA resource to certificated teaching staff salaries.

Group	Percentage of GF Cost per group	Percentage applied to EPA funds	Amount
Certificated Staff	100%	100%	\$128,200
<b>Total:</b>	<b>100%</b>	<b>100%</b>	<b>\$128,200</b>

**Expenditures by Funcon - Detail**

Certificated Positions			
Classroom Salaries	Teacher	1.25	1000/1100
<b>Totals</b>		<b>1.25</b>	<b>1000/1100</b>

EPA Requirements Met?	YES
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**RECOMMENDATION:**

Staff requests that the Board approve the 2024-25 Education Protection Account (EPA) plan.

**FINANCIAL IMPACT:**

Proposition 30 and Proposition 55 fund the Education Protection Account, increase the Charter's revenues to provide more credentialed teaching resources for students and positively impact the charter's revenue stream.





## **ACTION: APPROVAL OF 2022-23 EPA Plan Actuals**

### **RECOMMENDATION:**

Staff requests that the Board approve the 2022-23 Education Protection Account (EPA) plan actuals as stated below.

### **BACKGROUND:**

Proposition 30, The Schools and Local Public Safety Protection Account of 2012, approved by the voters on November 6, 2012, temporarily increases the state's sales tax rate for all taxpayers and the personal income tax rates for upper-income taxpayers.

Proposition 30 provides that all K-14 local agencies have the sole authority to determine how the funds received from the EPA are spent, but with these provisions:

- The spending plan must be approved by the governing board during a public meeting.
- EPA funds cannot be used for the salaries or benefits of administrators or any other administrative costs. (See the list of functions on the CDE website referenced below for which EPA funds may be used.)
- Each year, the local agency must publish on its website an accounting of how much money was received from the EPA and how the funds were expended.

The revenues generated from Proposition 30 are deposited into a state account called the Education Protection Account (EPA). School districts, county offices of education, and charter schools (LEAs) will receive funds from the EPA based on their proportionate share of the statewide revenue limit amount. A corresponding reduction is made to an LEA's revenue limit EPA entitlement. LEAs received EPA payments quarterly beginning with the 2013-14 Fiscal Year.

In November 2016, Proposition 55, a Tax extension, amended Proposition 30, providing continued allocation. Of the revenues generated from Section 36 of Article XIII EPA funds, 89 percent are provided to K-12 Education and 11 percent to community colleges.

It is proposed that EPA funds be used to cover salary and benefit costs of non-administrative certificated staff. The percentage of funds used per group is determined by their share of costs to the general fund. Salaries below are calculated assuming no furlough days and/or salary rollbacks. Any difference in revenue and/or expenditures will be adjusted in teacher salaries (function 1000; object 1100).

For frequently asked questions about EPA, please refer to the California Department of Education’s website at: <http://www.cde.ca.gov/fg/aa/pa/pafaq.asp>.

**CURRENT CONSIDERATIONS:**

Excel Academy Charter School estimated 2022-23 EPA entitlement is \$109,182 Helendale.

Staff has coded 100% of the EPA resource to certificated teaching staff salaries.

Group	Percentage of GF Cost per group	Percentage applied to EPA funds	Amount
Certificated Staff	100%	100%	\$109,182
<b>Total:</b>	<b>100%</b>	<b>100%</b>	<b>\$109,182</b>

**Expenditures by Function - Detail**

Certificated Positions			
Position	Number of Employees	SACS Function/Object	Cost
Classroom Teacher Salaries	1.25	1000/1100	\$109,182
<b>Totals</b>	<b>1.25</b>	<b>1000/1100</b>	<b>\$ 109,182</b>

EPA Requirements Met?	YES
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**FINANCIAL IMPACT:**

Proposition 30 and Proposition 55 fund the Education Protection Account, increase the charter’s revenues to provide more credentialed teaching resources for students, and have a positive impact on the charter’s revenue stream.



Excel Academy Charter School-Warner's estimated 2024-25 EPA entitlement is \$200,600. Staff proposes to code 100% of the EPA resource to certificated teaching staff salaries.

Group	Percentage of GF Cost per group	The percentage applied to EPA funds	Amount
Certificated Staff	100%	100%	\$200,600
<b>Total:</b>	<b>100%</b>	<b>100%</b>	<b>\$200,600</b>

**Proposed Expenditures by Function - Detail**

Certificated Positions			
Position	Number of Employees	SACS Function/Object	Cost
Classroom Teacher Salaries	2.25	1000/1100	\$200,600
<b>Totals</b>	<b>2.25</b>	<b>1000/1100</b>	<b>\$200,600</b>

The following summary shows the fiscal year 2025, 2026, and 2027 revenue and expenditure calculations:

Excel Academy Charter School - Warner	
Education Protection Account Spending Summary	
<b>2024-25 Fiscal Year:</b>	
Final Education Protection Account (EPA) Revenues:	\$200,600
EPA Expenditures on Teacher Salaries & Benefits:	<b>\$200,600</b>
<b>Unspent 2024-25 EPA Revenues:</b>	-

<b>2025-26 Fiscal Year:</b>	
<i>Projected</i> Education Protection Account (EPA) Revenues:	\$202,606
EPA Expenditures on Teacher Salaries & Benefits:	<b>\$202,606</b>
<b>Unspent 2025-26 EPA Revenues:</b>	-
<b>2026-27 Fiscal Year:</b>	
<i>Projected</i> Education Protection Account (EPA) Revenues:	\$204,632
EPA Expenditures on Teacher Salaries & Benefits:	<b>\$204,632</b>
<b>Unspent 2026-27 EPA Revenues:</b>	-
<b>EPA Requirements Met in Each Year?</b>	<b>YES</b>



### **ACTION: Warner - APPROVAL OF 2024-25 EPA PLAN**

#### **BACKGROUND:**

Proposition 30, The Schools and Local Public Safety Protection Account of 2012, approved by the voters on November 6, 2012, temporarily increases the state's sales tax rate for all taxpayers and the personal income tax rates for upper-income taxpayers.

Proposition 30 provides that all K-14 local agencies have the sole authority to determine how the funds received from the EPA are spent, but with these provisions:

- The spending plan must be approved by the governing board during a public meeting.
- EPA funds cannot be used for the salaries or benefits of administrators or any other administrative costs. (See the list of functions on the CDE website referenced below for which EPA funds may be used.)
- Each year, the local agency must publish on its website an accounting of how much money was received from the EPA and how the funds were expended.

The revenues generated from Proposition 30 are deposited into a state account called the Education Protection Account (EPA). School districts, county offices of education, and charter schools (LEAs) will receive funds from the EPA based on their proportionate share of the statewide revenue limit amount. A corresponding reduction is made to an LEA's revenue limit EPA entitlement. LEAs received EPA payments quarterly beginning with the 2013-14 Fiscal Year.

In November 2016, the Proposition 55 Tax extension amended Proposition 30, providing continued allocation. Of the revenues generated from Section 36 of Article XIII EPA funds, 89 percent are provided to K-12 Education and 11 percent to community colleges.

EPA funds are proposed to cover non-administrative certificated staff's salary and benefit costs. Their share of costs determines the percentage of funds used per group to the general fund. The salaries below are calculated assuming no furlough days and/or salary rollbacks. Any difference in revenue and/or expenditures will be adjusted in teacher salaries (function 1000; object 1100). For frequently asked questions about EPA, please refer to the California Department of Education’s website at <http://www.cde.ca.gov/fg/aa/pa/pafaq.asp>.

**CURRENT CONSIDERATIONS:**

Excel Academy Charter School's estimated 2024-25 EPA entitlement is \$200,600, Warner. The staff has coded 100% of the EPA resource to certificated teaching staff salaries.

Group	Percentage of GF Cost per group	Percentage applied to EPA funds	Amount
Certificated Staff	100%	100%	\$200,600
<b>Total:</b>	<b>100%</b>	<b>100%</b>	<b>\$200,600</b>

**Expenditures by Function - Detail**

Certificated Positions			
Classroom Teacher Salaries	2.25	1000/1100	\$200,600
<b>Totals</b>	<b>2.25</b>	<b>1000/1100</b>	<b>\$200,600</b>

EPA Requirements Met?	YES
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**RECOMMENDATION:**

Staff requests that the Board approve the 2024-25 Education Protection Account (EPA) plan.

**FINANCIAL IMPACT:**

Proposition 30 and Proposition 55 fund the Education Protection Account, increase the Charter's revenues to provide more credentialed teaching resources for students and positively impact the charter's revenue stream.





## **ACTION: APPROVAL OF 2022-23 EPA Plan Actuals**

### **RECOMMENDATION:**

Staff requests that the Board approve the 2022-23 Education Protection Account (EPA) plan actuals as stated below.

### **BACKGROUND:**

Proposition 30, The Schools and Local Public Safety Protection Account of 2012, approved by the voters on November 6, 2012, temporarily increases the state's sales tax rate for all taxpayers and the personal income tax rates for upper-income taxpayers.

Proposition 30 provides that all K-14 local agencies have the sole authority to determine how the funds received from the EPA are spent, but with these provisions:

- The spending plan must be approved by the governing board during a public meeting.
- EPA funds cannot be used for the salaries or benefits of administrators or any other administrative costs. (See the list of functions on the CDE website referenced below for which EPA funds may be used.)
- Each year, the local agency must publish on its website an accounting of how much money was received from the EPA and how the funds were expended.

The revenues generated from Proposition 30 are deposited into a state account called the Education Protection Account (EPA). School districts, county offices of education, and charter schools (LEAs) will receive funds from the EPA based on their proportionate share of the statewide revenue limit amount. A corresponding reduction is made to an LEA's revenue limit EPA entitlement. LEAs received EPA payments quarterly beginning with the 2013-14 Fiscal Year.

In November 2016, Proposition 55, a Tax extension, amended Proposition 30, providing continued allocation. Of the revenues generated from Section 36 of Article XIII EPA funds, 89 percent are provided to K-12 Education and 11 percent to community colleges.

It is proposed that EPA funds be used to cover salary and benefit costs of non-administrative certificated staff. The percentage of funds used per group is determined by their share of costs to the general fund. Salaries below are calculated assuming no furlough days and/or salary rollbacks. Any difference in revenue and/or expenditures will be adjusted in teacher salaries (function 1000; object 1100).

For frequently asked questions about EPA, please refer to the California Department of Education’s website at <http://www.cde.ca.gov/fg/aa/pa/pafaq.asp>.

**CURRENT CONSIDERATIONS:**

Excel Academy Charter School estimated 2022-23 EPA entitlement is \$211,002, Warner.

Staff has coded 100% of the EPA resource to certificated teaching staff salaries.

Group	Percentage of GF Cost per group	Percentage applied to EPA funds	Amount
Certificated Staff	100%	100%	\$211,002
<b>Total:</b>	<b>100%</b>	<b>100%</b>	<b>\$211,002</b>

**Expenditures by Function - Detail**

Certificated Positions			
Position	Number of Employees	SACS Function/Object	Cost
Classroom Teacher Salaries	2.25	1000/1100	\$211,002
<b>Totals</b>	<b>2.25</b>	<b>1000/1100</b>	<b>\$ 211,002</b>

EPA Requirements Met?	YES
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**FINANCIAL IMPACT:**

Proposition 30 and Proposition 55 fund the Education Protection Account, increase the charter’s revenues to provide more credentialed teaching resources for students, and positively impact the charter’s revenue stream.