



## Excel Academy (CA)

### Regular Meeting of the Board of Directors

Published on September 5, 2025 at 4:06 PM PDT

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#### **Date and Time**

Thursday September 11, 2025 at 9:40 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:**

**Meeting ID: 885 1913 1765**

**One-Tap Dial In: +16694449171,,88519131765#**

**URL: <https://us06web.zoom.us/j/88519131765>**

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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>9:40 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>9:42 AM</b>
<b>A.</b> Patriot Day & National Day of Service and Remembrance	Discuss		1 m
Let's take a moment to honor <b>Patriot Day and the National Day of Service and Remembrance</b> . We pause to remember and pay tribute to the victims of the September 11, 2001, terrorist attacks, as well as the brave first responders and citizens who demonstrated incredible heroism.			
<b>III. Approve/Adopt Agenda</b>			<b>9:43 AM</b>

	Purpose	Presenter	Time
<b>A. Agenda</b>	Vote	William Hall	1 m

It is recommended the Board of Directors adopt as presented, the agenda for the Regular Board meeting of September 11, 2025.

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

**IV. Approve Minutes 9:44 AM**

<b>A. Approve Minutes</b>	Approve Minutes	William Hall	1 m
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Minutes of the Board Study Session that was held on August 14, 2025.

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

Approve minutes for Board of Directors Study Session on August 14, 2025

**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.

	Purpose	Presenter	Time
<b>VI. Correspondence/Proposals/Reports</b>			<b>9:45 AM</b>
<b>A.</b> School Highlights - Presented by Heidi Gasca, Superintendent/CEO	Discuss	Heidi Gasca	8 m
<b>B.</b> Student Testimonials - Student Leadership	Discuss	Elizah Limeta, Preston Tobias & Emma Espinoza	12 m
<p><i>Elizah Limeta (7th) - Junior High Student Leadership (<a href="#">Excel Vlog</a>)</i>  <i>Emma Espinoza (10th) - High School Student Leadership Vice President</i>  <i>Preston Tobias (12th) - High School Student Leadership President</i></p>			
<b>C.</b> CliftonLarsonAllen LLP (CLA) Governance Entrance Letter - Presented by Heidi Gasca, Superintendent/CEO	Discuss	Heidi Gasca	3 m
<b>VII. Consent</b>			<b>10:08 AM</b>
<p>Items listed under Consent are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent upon the request of any member of the Board, discussed, and acted upon separately.</p>			
<b>A. Consent - Business/Financial Services</b>			
<ol style="list-style-type: none"> <li>1. Check Register - June 2025</li> <li>2. Check Register - July 2025</li> <li>3. Check Register - August 2025</li> <li>4. Cash Payments - June 2025</li> <li>5. Cash Payments - July 2025</li> <li>6. Cash Payments - August 2025</li> </ol>			
<b>B. Consent - Education Student/Services</b>			
<ol style="list-style-type: none"> <li>1. Approval of the Pali Institute Overnight Science Camp Field Trip</li> </ol>			

	Purpose	Presenter	Time
	2. Approval of the 2025-2026 Excel Academy Charter School English Language Development (ELD) Handbook for Families		
	3. Approval of the 2025-2026 Excel Academy Handbook Revisions		
	4. Approval of the UPK Criterion 2 Proposal Addendum		
	5. Ratification of the 2025-2026 Special Education Contracted Vendors List		
	6. Ratification of the 2025-2026 Nonpublic, Nonsectarian School/Agency Services Master Contract and Individual Service Agreement		
<b>C.</b>	Consent - Personnel Services	Vote	William Hall
	1. Approval of Certificated Personnel Report		
	2. Approval of Classified Personnel Report		
	3. Approval of EACS Travel Manual Revisions		

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

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

**VIII. Board Governance**

**10:09 AM**

<b>A.</b>	Approval of the Annual Board of Director's Self-Evaluation	Vote	Heidi Gasca	3 m
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It is recommended that the Board approve the final Annual Board of Director's Self-Evaluation for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

Purpose                      Presenter                      Time

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

**IX. Business/Financial Services 10:12 AM**

- A.** Approval of Unaudited Actuals for the 2024-2025 School Year      Vote                      Joe Sorrera                      8 m

It is recommended the Board approve the Unaudited Actuals for the 2024-2025 School Year for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

- B.** Approval of the Proposition 28 Arts & Music Grant Annual Report      Vote                      Joe Sorrera                      5 m

It is recommended the Board approve the Proposition 28 Arts & Music Grant Annual Report for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

**Fiscal Impact:** N/A

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

**X. Personnel Services 10:25 AM**

- A.** Approval of Superintendent/CEO Goals for 2025-2026      Vote                      Heidi Gasca                      3 m

Purpose

Presenter

Time

It is recommended that the Board approve the Superintendent/CEO Goals for 2025-2026, presented during the Board Study Session which was held on August 14, 2025.

**Fiscal Impact:** N/A

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

- |           |  |      |                |     |
|-----------|--|------|----------------|-----|
| <b>B.</b> | Ratification of ClassPass for Excel Academy Charter School Staff for 2025-2026 (Renewal) | Vote | Megan Anderson | 3 m |
|-----------|--|------|----------------|-----|

It is recommended that the Board approve the ClassPass renewal for 2025-2026, for Excel Academy Charter Schools, Helendale (#2073) and Warner (#2053).

**Fiscal Impact:** \$44,064.00

Warner (#2053): \$27,319.68

Helendale (#2073): \$16,744.32

Roll Call Vote:

William Hall

Michael Humphrey

Steve Fraire

Susan Houle

Larry Alvarado

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

**XI. Calendar**

The next scheduled Regular Board Meeting will be held both in person and virtually on October 9, 2025.

**XII. Board Comments**

**XIII. CEO Comments**

	Purpose	Presenter	Time
<b>XIV. Closing Items</b>			<b>10:31 AM</b>
<b>A. Adjourn Meeting</b>	Vote	William Hall	1 m
Roll Call Vote:			
William Hall			
Michael Humphrey			
Steve Fraire			
Susan Houle			
Larry Alvarado			
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

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FOR MORE INFORMATION

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



# Coversheet

## Approve Minutes

**Section:** IV. Approve Minutes  
**Item:** A. Approve Minutes  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for Board of Directors Study Session on August 14, 2025

APPROVED



## Excel Academy (CA)

# Minutes

## Board of Directors Study Session

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### Date and Time

Thursday August 14, 2025 at 9:50 AM

### Location

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

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

### Zoom Meeting Information:

**Meeting ID: 827 9681 9015**

**Dial In: +1 253 215 8782**

**URL: <https://us06web.zoom.us/j/82796819015>**

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### MISSION STATEMENT

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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 Aug 14, 2025 at 10:16 AM.

#### **B. Record Attendance**

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

#### **A. Agenda**

M. Humphrey made a motion to Bill Hall.

L. Alvarado seconded the motion.

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

### **III. Approve Minutes**

#### **A. Minutes of the Regular Board Meeting held on June 12, 2025**

S. Houle made a motion to approve the minutes from Regular Meeting of the Board of Directors on 06-12-25.

S. Fraire seconded the motion.

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

**B. Minutes of the Regular Board Meeting held on June 18, 2025**

S. Houle made a motion to approve the minutes from Regular Meeting of the Board of Directors on 06-18-25.

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.**

M. Humphrey made a motion to Bill Hall.

L. Alvarado seconded the motion.

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

**V. Closed Session**

**A. Closed Session**

Adjourned to closed session.

**VI. Reconvene Regular Meeting**

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

The Board approved unanimously the settlement of case **202505-1015**.

**VII. Consent**

**A. Consent - Policy Development**

M. Humphrey made a motion to Bill Hall.

S. Houle seconded the motion.

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

**VIII. Education/Student Services**

**A. Ratification of Additional Licenses for FlexPoint Education Cloud**

S. Houle made a motion to Bill Hall.

L. Alvarado seconded the motion.

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

**B.**

### **Ratification of 1st Day School Supplies Boxes**

S. Houle made a motion to Bill Hall.

M. Humphrey seconded the motion.

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

## **IX. Personnel Services**

### **A. Annual Superintendent/CEO Evaluation Timeline and Plan**

S. Houle made a motion to Bill Hall.

L. Alvarado seconded the motion.

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

## **X. Oral Presentations**

### **A. Annual Board of Directors' Self-Evaluation**

Annual Board of Directors' Self-Evaluation

### **B. Annual Superintendent/CEO Goals**

Annual Superintendent/CEO Goals

## **XI. Calendar**

### **A. Calendar**

Next Board meeting will be on September 11, 2025.

## **XII. 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 11:09 AM.

Respectfully Submitted,

W. Hall

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### **FOR MORE INFORMATION**

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

# Coversheet

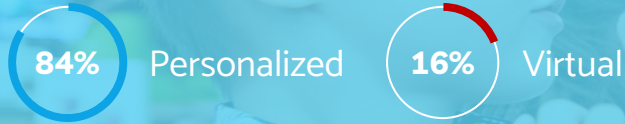
## School Highlights - Presented by Heidi Gasca, Superintendent/CEO

**Section:** VI. Correspondence/Proposals/Reports  
**Item:** A. School Highlights - Presented by Heidi Gasca, Superintendent/CEO  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:** EACS August 2025 Board Update.pdf



# Enrollment Data

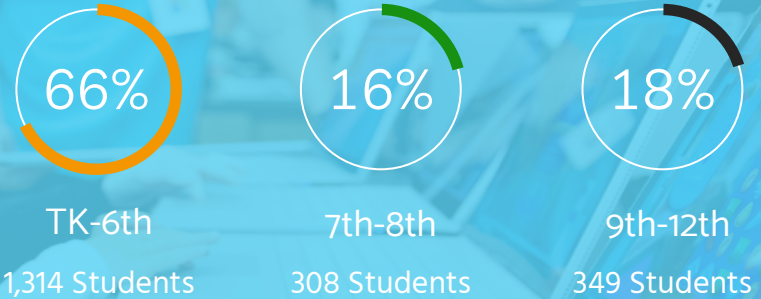
## Academic Path



16%

Enrollment increase from Sept 2024 to Sept. 2025

## Student Count: 1,971



**Warner:**

1159 Students

**Helendale:**

812 Students



# All Staff Professional Development



## GO FOR GOLD

*Achieving Our Personal Best*

*“Achieving our personal best as educators means showing up each day with **grit, dedication, and heart**. It means **setting high expectations** not only for our students, but also for ourselves. It means **modeling lifelong learning** for our families, being **open to new ideas**, striving toward **professional and personal growth**, and **never settling for “good enough”** when greatness is within reach.”*



## A spectrum of Seven outcomes for AI augmentation

- 01 **Perception** (what's happening)
- 02 **Notification** (what do I need to know/do)
- 03 **Suggestion** (what do you recommend)
- 04 **Automation** (what should I always do)
- 05 **Prediction** (what can I expect to happen)
- 06 **Prevention** (what can I avoid - RISK mitigation)
- 07 **Situational Awareness** (what do I need to know)



The goal of AI in education *isn't* to replace the irreplaceable human connection—it's to **handle the mundane** so you can **focus on the meaningful**.

 <b>Lauren uses...</b> Descript: To transcribe and/or edit videos/audio Gemini & ChatGPT: For researching, expanding on ideas, policy & manual creation, rewording, title ideas Zoom AI Companion: To take notes, summarize, and create action steps for meetings	 <b>Jenn uses...</b> MagicSchool: To research tools to pass onto teachers Canva Magic Studio: To create staff PD ChatGPT: To draft professional emails	 <b>Daniel uses...</b> Gamma: To create presentations Grammarly: To assist with email drafts Gemini: Gemini: For research purposes
 <b>Jill uses...</b> Perplexity, MagicSchool, ChatGPT: Scrapes the pdf printout of grades for missing assignments from Bright Thinker and have it make a 5 day catch-up schedule. It saves an hour of her time.	 <b>Shondra uses...</b> Brisk: To provide brief student feedback on writing, creating quizzes based on videos, generating rubrics, and creating worksheets. NotebookLM: For research and note taking.	 <b>Meri uses...</b> Notebook LM: To combine multiple articles or lists of information. Then I can easily search for information across multiple sources.

# Team COMPETITION



## The G-Suite Olympiad: A Digital Scavenger Hunt

**Objective:** To help Excel Academy staff become more proficient in navigating the school's G-Suite and Shared Drive by working collaboratively to find key resources.

### Activity Overview

Welcome to the Excel Academy G-Suite Olympiad! In this event, your table teams will represent a "country" and compete for gold medals by completing a series of digital scavenger hunt "events." This is a collaborative activity designed to help staff from all departments (teachers, SPED, office, admin) share knowledge and discover where essential resources are stored.



**EXCEL ACADEMY**  
P.A. PUBLIC CHARTER SCHOOLS

## Connecting with Non-English Speaking Families

Bonjour  
Ciao  
GUTEN Tag  
你好

## Microsoft Immersive Reader

Great for translation & reading comprehension

- Many platforms** > Available with Microsoft Edge, Word For Mac, Flipgrid, One Note and more
- Many tools** > Text to speech, customizable fonts and spacing, line focus and division of syllables
- Many languages** > **Written translation** is available in over 60 languages!
- Chrome Extension** > Download in the Google Chrome Store to use these features in Google Suite



By earning a national ranking in the top 40%, Excel Academy Charter achieved status as a U.S. News Best High School.

EACS was ranked #806 within California (out of 2,586 schools), and #6,754 in the Nation (out of 18,000 schools).

# NEW STAFF





# CAASPP CELEBRATIONS



## Overall School Growth

01

### PARTICIPATION

\*\*\*Internal %

State % not yet released

**CS - 96.5%**

**EAST - 98.9%**

**Overall - 97.7%**

02

### EL GROWTH

**ELA - 31% met or exceeded**  
**Math - 31% met or exceeded**

**GREW BY 12% in ELA and math from 23/24**

03

### STUDENTS WITH DISABILITIES

**ELA - 29% met or exceeded**  
**Math - 24% met or exceeded**

**GREW BY 1% in ELA and 6% in math**

04

### SOCIO ECON DISADVANTAGED

**ELA - 53% met or exceeded**  
**Math - 47% met or exceeded**

**GREW BY 2% in ELA and 5% in math**

# Highlights

## Virtual Path

## Elementary

## Secondary

- Onboarded 7 new, enthusiastic, and student-centered virtual teachers!
- Welcomed 136 brand new students and 54 transfers to the Virtual Pathway
- Crisis Response, SEL, and Tier 1 intervention training for all Virtual Pathway teachers
- Meet & Greet with teachers at Back to School Event

- Onboarded 5 NEW Teachers of Record
- Piloting a new digital curriculum: *On Fire Learning*
- Updated reading fluency assessments to better identify decoding struggles
- Launched *Curriculum Communities*--a safe space for parent educators to receive training and support in their specific curriculum from parents and staff

- Onboarded 4 new single-subject teachers
- Student Leaders - 1st annual team building event at Escape Room + welcomed students at BTS + hosted In n Out fundraiser.
- Hosted Tier 1 Teacher Training for Secondary Staff
- Promoted A.C.E. and 7-12 extra-curriculars - building community with daily activities at Back to School Event





*Secondary Principal, Lorrie Wood  
and Secondary Assistant Principal,  
Tori Firetag received an  
all-expense paid week of training  
and professional development in  
Washington D.C. July 14-18*

# Sphere Summit: 2025

Cultivating Curiosity, Openness, and Civil  
Discourse in Every Classroom

**GOAL: Build a culture to empower secondary teachers, staff, and students to model civility across all levels of learning.**

- Restore spirit of civil, constructive, and respectful discourse and classroom engagement with non-partisan tools & strategies
- Model cooperative discussion and debates as leaders
- Create learning spaces where all students' voices are heard



# Special Education

Big enrollment year! In the process of onboarding approx 60 new students with IEPs

Expanding 25-26 group class offerings related to study skills and independence.

Welcomes a new mod-severe Case Manager to fill our retiree's spot along with a part-time psychologist.



**FREE**

**EXCEL ACADEMY**

# EACS DROP-IN CLASSES

No registration necessary--drop in as you please!

Day	Class	Time	Grade
MON	SOCIAL EMOTIONAL LEARNING (SEL)	10:00-10:30 AM - TK-1st 11:10-11:40 AM - 5th-6th 10:35-11:05 AM - 2nd-4th	
MON	TEEN TALK (SEL)	11:45-12:15 PM - 7th-8th 12:20-12:50 PM - 9th-12th	
TUES & WEDS	ART (with Ms. Gina D'Elia)	10:00-10:30 AM - TK-1st 11:10-11:40 AM - 5th-6th 10:35-11:05 AM - 2nd-4th 11:45-12:15 AM - 7th-8th	
WEDS	HOMEWORK HELP (English & Social Studies)	10:00-11:00 AM - 7th-12th	
THURS	SING-ALONG	10:00-10:30 AM - TK-2nd 10:35-11:05 AM - 3rd-6th	
THURS	MUSIC CLUB	12:30-1:00 PM - 7th-8th	
FRI	HOMEWORK HELP (Math & Science)	10:00-11:00 AM - 7th-12th	
FRI	READ ALOUDS	10:00-10:30 AM - TK-2nd 10:35-11:05 AM - 3rd-6th	

**ZOOM & MATERIALS LINKS BELOW!**

## Expanding Arts & Music!

# Educational Programs

**EXCEL ACADEMY**

# VIRTUAL Eagle Art Classes

1ST-2ND GRADE  
MONDAYS 10:00 AM - 10:30 AM  
WEDNESDAYS 12:00 PM - 12:30 PM

3RD-4TH GRADE  
MONDAYS 12:00 PM - 12:30 PM  
WEDNESDAYS 10:00 AM - 10:30 AM

5TH-6TH GRADE  
MONDAYS 11:00 AM - 11:30 AM  
WEDNESDAYS 3:00 PM - 3:30 PM

7TH-8TH GRADE (VIRTUAL PATH ONLY)  
TUESDAYS 10:00 AM - 10:30 AM

THESE CLASSES ARE FREE!

LIMITED SPACES AVAILABLE

**MUSIC CLUB**

High School Students Only

WEDNESDAYS  
EXCEL ACADEMY  
1:00-1:45pm

Sign up now! Club begins September 3rd!

**EXCEL ACADEMY**

# JOIN CHOIR!

Sing, connect, and grow your voice in a fun and supportive choir!  
Registration is valid until

**FOR 6-8<sup>TH</sup> GRADERS ONLY**

SIGN UP NOW!  
CHOIR BEGINS SEPTEMBER 2ND!

Increased our free daily Drop-In Class offerings: Art, Elementary SEL, Homework Help, Teen Talk, Sing-Along and Read Alouds

# Parent Training

The Excel Team held their annual Parent Academy Live Online event for all Excel Academy Parents!

With over 100 parents in attendance, sessions included:



- Updates from the Principals
- Mastering the Family Hub & Ordering Guide
- Student & Parent Engagement at EACS
- Winning Strategies to Support Students
- Use Routines, Spaces, and Materials Like a Pro
- Preparing for Learning Period Meetings
- Work Samples that Shine

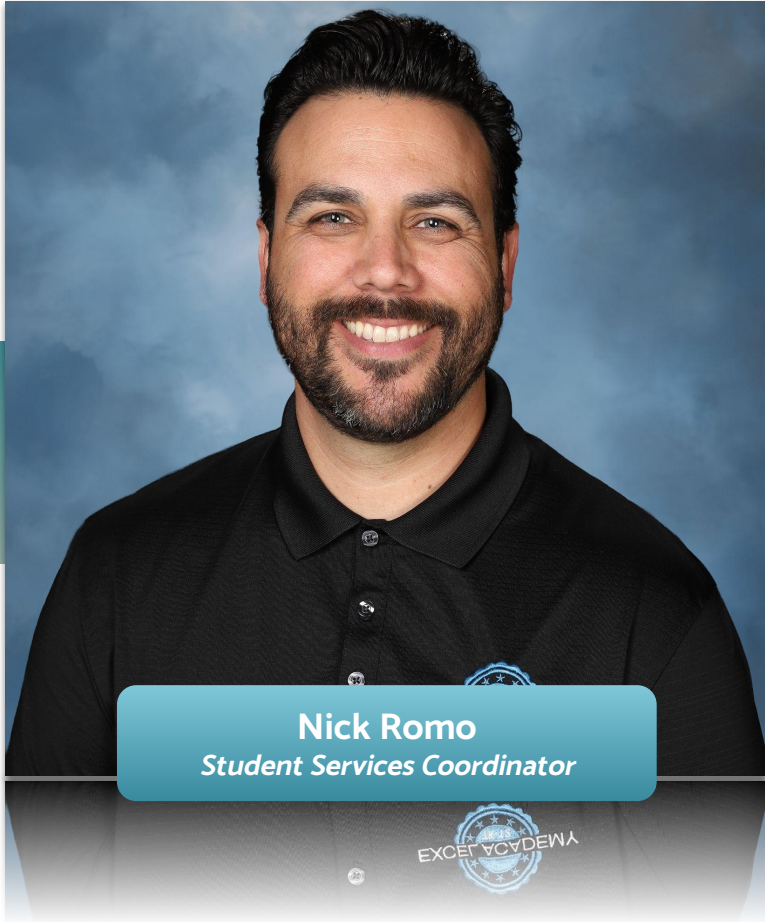
SESSION SCHEDULE		
Time	Session	Presenter
9:30 AM	<b>Opening Ceremonies: Meet your Principal Team &amp; 25-26 Updates</b>	<i>April Saade, Jenn Sheehey &amp; Lorrie Wood</i>
9:50 AM	<b>Digital Decathlon: Master the Family Hub and Ordering Guide</b>	<i>Lauren Hansen &amp; Ameneh Zahedi</i>
10:10 AM	<b>From Spectator to Superfan: Jump Into Student and Parent Engagement at EACS!</b>	<i>Lauren Hansen &amp; Melissa Harvilla</i>
10:30 AM	<b>Go for the Gold: Winning Strategies to Support Your Student</b>	<i>Tamara Murphy</i>
10:50 AM	<b>BREAK</b>	
11:00 AM	<b>Home Training Camp: Use Routines, Spaces and Materials Like a Pro</b>	<i>Erin Petersen</i>
11:20 AM	<b>On Your Mark, Get Set...GO: Preparing for Your Learning Period Meetings</b>	<i>Chiara Hawley</i>
11:40 AM	<b>The Highlight Reel: Work Samples that Shine!</b>	<i>Victoria Firetag</i>
12:00 PM	<b>Finish Line Festivities</b>	

# Community Highlight

Excel Academy hosted its annual Back-to-School Events, where families were provided an opportunity to talk to local CCPs, students enjoyed crafts, a petting zoo, science demonstration, In-N-Out & dessert food trucks, fun giveaways, and received their collector's pin and lanyard.

Across the five events, over **900** students were in attendance!





**Nick Romo**  
*Student Services Coordinator*

## Staff Spotlight

Nick's return to Excel Academy has been nothing short of a huge win for our school community. Nick's guidance has proven instrumental, providing a steady hand in the oversight of our admissions team and leading our efforts in the retention of students. Beyond his direct responsibilities, he is a tireless advocate for our institution, ensuring our compliance efforts are handled with the utmost care. As a new addition to the Executive Cabinet, his wealth of experience and thoughtful perspective have made an immediate and valuable impact. Nick is a historical pillar who has been essential in helping to build and sustain the incredible programs that define our school's legacy.



# Thank you!

# Coversheet

## Student Testimonials - Student Leadership

**Section:** VI. Correspondence/Proposals/Reports  
**Item:** B. Student Testimonials - Student Leadership  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:** Excel Academy Minecraft-Edu Club.pdf



# Excel Academy Minecraft-Edu Club



- Online STEM instructional tool for teachers
- Easy to use, fun to play TK-12th friendly
- Learn to collaborate
- Problem solving skills
- Teaches interpersonal skills
- CREATIVITY
- Increase student engagement
- Develops social skills



## Coversheet

### CliftonLarsonAllen LLP (CLA) Governance Entrance Letter - Presented by Heidi Gasca, Superintendent/CEO

**Section:** VI. Correspondence/Proposals/Reports  
**Item:** C. CliftonLarsonAllen LLP (CLA) Governance Entrance Letter - Presented  
by Heidi Gasca, Superintendent/CEO  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:** Governance Communication FY25 (1).pdf  
Charter Industry Tool.pdf



CliftonLarsonAllen LLP

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Glendora, CA 91740

phone 626.857.7300 fax 626.857.7302  
CLAconnect.com

July 1, 2025

To the Board and Management of  
Excel Academy Charter Schools

We are engaged to audit the financial statements of Excel Academy Charter Schools as of and for the year ended June 30, 2025. Professional standards require that we communicate to you the following information related to our audit. We will contact you to schedule a meeting to discuss this information since a two-way dialogue can provide valuable information for the audit process. We ask if you have any questions or need clarification to any of email the following: [Wade.McMullen@claconnect.com](mailto:Wade.McMullen@claconnect.com), [Derrick.Debruyne@claconnect.com](mailto:Derrick.Debruyne@claconnect.com), [Lili.Huang@claconnect.com](mailto:Lili.Huang@claconnect.com), [Marlen.Gomez@claconnect.com](mailto:Marlen.Gomez@claconnect.com).

### Deadline, Timelines and Meetings

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

### To file the report on or before the December 15, 2025 state deadline:

- Spring interim and final field work will be scheduled with assistance from management and interim deadlines will be established.
- We will schedule an interim exit meeting with management and certain members of governance to discuss any audit issues. This will ensure that all interim audit work and personnel interviews are complete by **August 1, 2025**. We will also use this meeting to revisit and re-confirm final audit fieldwork dates and the governance meeting date to review the audit draft.
- Final fieldwork scheduling dates will need to be prior to **October 31, 2025**, if possible. If final fieldwork dates are scheduled after this date, all information requested must be received by **October 31, 2025**.
- We request that basic financial information (**trial balance and general ledger as of June 30, 2025 and general ledger for the next fiscal year**) be transmitted to us no later than August 26, 2025. Earlier transmittal is strongly encouraged.
- In order to file the report on or before the December 15 state deadline, **all audit information requests made prior to October 20, 2025 should be received no later than October 31, 2025**. This will allow us the time needed to complete the audit and submit our working-papers to our national assurance quality control team.

If a *significant amount* of the audit information requests are not received by the specified dates, we will send a letter to Board and Management specifying the extent of outstanding information and possibly recommend notifying Excel Academy Charter Schools's authorizer that an audit report filing extension to **January 31, 2026** is needed. **The decision to apply for this extension is solely the responsibility of Excel Academy Charter Schools's Board and Management.**

**Our responsibility under Auditing Standards Generally Accepted in the United States of America and Government Auditing Standards*****Financial statements, internal control, and compliance***

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

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

- Identify and assess the risks of material misstatement of the financial statements and material noncompliance, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinions. The risk of not detecting a material misstatement or a material noncompliance resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. However, we will communicate to you in writing any significant deficiencies or material weaknesses in internal control relevant to the audit of the financial statements that we identify during the audit that are required to be communicated under U.S. GAAS and *Government Auditing Standards*.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements, including the amounts and disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.
- Conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the entity's ability to continue as a going concern for a reasonable period of time.
- Form and express an opinion about whether the financial statements prepared by management with your oversight are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America.
- Plan and perform the audit to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with U.S. GAAS and the standards for financial audits contained in *Government Auditing Standards* will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the

aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

- Perform, as part of obtaining reasonable assurance about whether the financial statements as a whole are free from material misstatement, tests of the entity's compliance with provisions of laws, regulations, contracts, and grant agreements that have a material effect on the financial statements. However, the objective of our tests is not to provide an opinion on compliance with such provisions and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.
- Provide a report (which does not include an opinion) on internal control over financial reporting and on compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements, as required by *Government Auditing Standards*.
- Communicate significant matters related to the financial statement audit that are, in our professional judgment, relevant to your responsibilities in overseeing the financial reporting process. However, we are not required to design procedures specifically to identify such matters.
- Communicate circumstances that affect the form and content of the auditors' report.
- Communicating any matters relevant to compliance with the *California State K-12 Audit Guide*.

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

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

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

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

- Plan and perform the audit to obtain reasonable assurance about whether material noncompliance with the applicable compliance requirements occurred. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with U.S. GAAS, *Government Auditing Standards*, and the Uniform Guidance will always detect material noncompliance when it exists. Material noncompliance can arise from fraud or error and is considered material if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report.
- Perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with the direct and material compliance requirements applicable to each major federal award program. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.
- Consider internal control over compliance with requirements that could have a direct and material effect on a major federal program in order to determine our auditing procedures for the purpose of expressing our opinion on compliance and to test and report on internal control over compliance in accordance with the Uniform Guidance.
- Perform tests of transactions and other applicable procedures described in the “OMB Compliance Supplement” for the types of compliance requirements that could have a direct and material effect on each of the entity’s major programs. The purpose of these procedures will be to express an opinion on the entity’s compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance. While our audit will provide a reasonable basis for our opinion, it will not provide a legal determination on the entity’s compliance with those requirements.
- Provide a report on internal control over compliance related to major programs and express an opinion (or disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Uniform Guidance.
- Our responsibility for the schedule of expenditures of federal awards (SEFA) accompanying the financial statements, as described by professional standards, is to evaluate the presentation of the SEFA in relation to the financial statements as a whole and to report on whether the SEFA is fairly stated, in all material respects, in relation to the financial statements as a whole. We will make certain inquiries of management and evaluate the form, content, and methods of preparing the SEFA to determine whether the SEFA complies with the requirements of the Uniform Guidance, the method of preparing it has not changed from the prior period, and the SEFA is appropriate and complete in relation to our audit of the financial statements. We will compare and reconcile the SEFA to the underlying accounting records used to prepare the financial statements or to the financial statements themselves.

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

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

***Supplementary information in relation to the financial statements as a whole***

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

**Planned scope and timing of the audit**

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

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

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

- Revenue recognition
- Management override of controls

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

We expect to begin our audit in the Spring of 2025 and issue our report no later than December 15, 2025.

### **Other planning matters**

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

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



- The risk that the entity's financial statements or schedule of expenditures of federal awards might be materially misstated due to fraud.
  - Programs and controls that the entity has established to mitigate identified fraud risks or that otherwise help to prevent, deter, and detect fraud.
  - How and how often you review the entity's policies on fraud prevention and detection.
  - If a fraud hotline is in place, how it is monitored and how you are notified of allegations or concerns.
  - How you exercise oversight of management's processes for identifying and responding to the risks of fraud and the programs and controls management has established to mitigate those risks.
  - The risks of fraud at the entity, including any specific fraud risks the entity has identified or account balances, classes of transactions, or disclosures for which a risk of fraud may be likely to exist.
  - Examples of fraud-related discussions management has had with you.
  - Any actual or suspected fraud affecting the entity or its federal award programs that you are aware of, including measures taken to address the fraud.
  - Any allegations of fraud or suspected fraud (e.g., received in communications from employees, former employees, grantors, regulators, or others) that you are aware of.
  - Any knowledge of possible or actual policy violations or abuses of broad programs and controls occurring during the period being audited or the subsequent period.
  - Any accounting policies or procedures applied to smooth earnings, meet debt covenants, minimize taxes, or achieve budget, bonus, or other financial targets that you are aware of; and whether you are aware of any accounting policies that you consider aggressive.
- How you oversee the entity's (1) compliance with laws, regulations, and provisions of contracts and grant agreements, (2) policies relative to the prevention of noncompliance and illegal acts, and (3) use of directives (for example, a code of ethics) and periodic representations obtained from management-level employees about compliance with laws, regulations, and provisions of contracts and grant agreements.
  - Whether you are aware of any noncompliance with laws, regulations, contracts, and grant agreements, including measures taken to address the noncompliance.
  - If the entity uses a service organization, your knowledge of any fraud, noncompliance, or uncorrected misstatements affecting the entity's financial statements or federal award programs reported by the service organization or otherwise known to you.

\* \* \*

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

Sincerely,

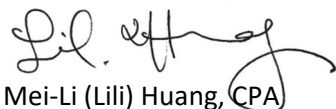
**CliftonLarsonAllen LLP**



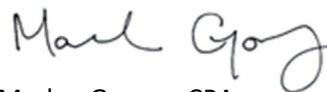
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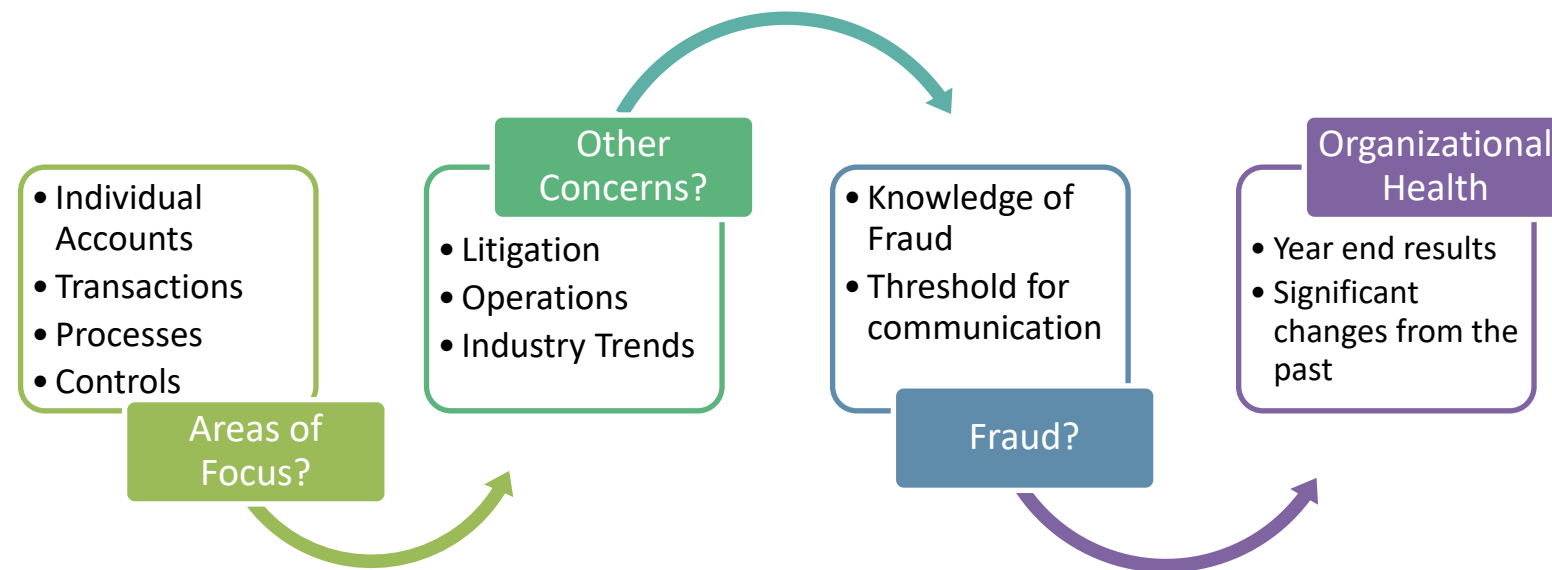


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# Create Opportunities

We promise to know you and help you.

## Governance and Management



## Ask us how we can help you with:

- CARES Act Funding and applicable Single Audit
- New accounting system
- Digital Analytics and Data

## Resource Tools

CLACONNECT:

<https://www.clacconnect.com/industries/nonprofit#Resources>

Charter School Audit Guide: <http://eaap.ca.gov/>

OMB Compliance Supplement: <https://www.fac.gov/compliance/>

CDE Revenue Funding: <https://www.cde.ca.gov/fg/fo/fr/>

## Implementing best practices

- Observation: Changes in personnel and operations have focused more attention on processes and procedures.
- Recommendation: CLA business opportunity assessment to analyze your structure, process and systems.

## Cybersecurity and risk management

- Observation: Cyber attacks are a prevalent threat and constantly evolving.
- Recommendation: CLA professionals can analyze key aspects of cybersecurity and make specific recommendations for your organization.

## Financial planning and wealth management

- Observation: High 401(k) fees
- Recommendation: CLA Retirement Plan Diagnostic with CLA Wealth Advisor



CLACONNECT.COM

WEALTH ADVISORY  
OUTSOURCING  
AUDIT, TAX, AND  
CONSULTING

# Coversheet

## Consent - Business/Financial Services

**Section:** VII. Consent  
**Item:** A. Consent - Business/Financial Services  
**Purpose:**  
**Submitted by:**  
**Related Material:** Check register 060125-063025.pdf  
Check register 070125-073125.xls.pdf  
Check register 080125-083125.pdf  
6.10.25 Semi Monthly Cash Requirement Rpt..pdf  
6.26.25 Semi Monthly Cash Requirement Rpt..pdf  
6.26.25 Monthly Cash Requirement Rpt..pdf  
7.10.25 Semi Monthly Cash Requirement Rpt..pdf  
7.25.25 Semi Monthly Cash Requirement Rpt..pdf  
7.25.25 Monthly Cash Requirement Rpt..pdf  
8.08.25 Semi Monthly Cash Requirement Rpt.pdf  
8.26.25 Semi Monthly Cash Requirement Rpt..pdf  
8.26.25 Monthly Cash Requirement Rpt..pdf















# Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 11, 2025 at 9:40 AM

Meeting Date	Meeting Time	Item #	Description	Category	Account Number	Amount	Other	Account Type	Notes	
6/9/2025	5/20/2025	A-361569096	169K-Jacki Poshon	988L-Instructional Vendors B	EFT	167876	1,793.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/9/2025	5/14/2025	162426	4117-Consultation Services, Inc 1377-Generation Genius, Inc.	EFT EFT	168189 164119	1,080.00 3,390.00	1,042.00 2,225.00	910-Instructional Funds 910-Schoolwide-Revenues/OS Accounts	384-L-Personal Academic Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/9/2025	5/28/2025	B-261008073	2800-Brian Buhlers STEM Education	5880-Instructional Vendors B	EFT	164008	3,463.72	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/9/2025	5/16/2025	B-261008073	1864-The Culture School	5880-Instructional Vendors B	EFT	2013600558	2,435.40	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/9/2025	5/23/2025	A-361569088	6034-Joshua Quinn School of Able Vision	988L-Instructional Vendors B	EFT	3911600916	1,798.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/9/2025	5/16/2025	A-361569084	9796-Bookie, LLP 2739-Bookie, LLC	988L-Instructional Vendors B 9880-Instructional Vendors B	EFT EFT	164875 164752	1,147.75 2,247.75	910-Instructional Funds	384-L-Personal Academic Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/9/2025	5/23/2025	2025-278	5623-Sewlyville 5622-Sewlyville	9100-Prepaid Expenses 9100-Prepaid Expenses	EFT EFT	164929 164939	3,000.00 3,000.00	000-Schoolwide-Revenues/OS Accounts	2073-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/9/2025	5/29/2025	B-261008073	3005-New California Conservatory of Music 1905-New California Conservatory of Music	5880-Instructional Vendors B 5880-Instructional Vendors B	EFT EFT	2013600620 2013600620	2,066.00 2,066.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/9/2025	5/27/2025	A-361569080	5454-Peterson Williams 5654-Denise Williams	988L-Instructional Vendors B 9880-Instructional Vendors B	EFT EFT	3911600566 2013600556	4,045.00 2,346.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner 2073-Excel Academy Charter School - Healdstate	
6/9/2025	5/31/2025	A-361569098	6553-L.M. Co. Lessons with Lisa	988L-Instructional Vendors B	EFT	164876	3,911.66	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/9/2025	5/29/2025	A-361569077	A14.L.A. Bar LLP	988L-Instructional Vendors B	EFT	164646	3,777.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/9/2025	5/14/2025	1641847824	919A-School Bathrooms, LLP 5388-School Pathways, LLC	919L-Prepaid Expenses 9100-Prepaid Expenses	EFT EFT	164174 164274	1,674.66 2,687.00	910-Schoolwide-Revenues/OS Accounts	384-L-Personal Academic Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/9/2025	2/15/2025	145032	3228-UC San Diego 3229-UC San Diego	5875-Field Trips 5880-Instructional Vendors B	EFT EFT	2013600544 2013600544	1,292.00 1,088.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/9/2025	2/15/2025	145031	3228-UC San Diego 3229-UC San Diego	5875-Field Trips 5880-Instructional Vendors B	EFT EFT	2013600544 2013600544	1,167.00 49.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/9/2025	5/24/2025	0000190101112	1648-UPC 2449-UPC	988L-Prepaid 9100-Prepaid	EFT EFT	164811 164812	64.76 54.20	910-Administrative/Prepaid	384-L-Personal Academic Charter School - Warner	
6/10/2025	5/16/2025	2089-060203	5796-8095-CharterLIFE 5796-8095-CharterLIFE 5796-8095-CharterLIFE 5796-8095-CharterLIFE 5796-8095-CharterLIFE 5796-8095-CharterLIFE 5796-8095-CharterLIFE 5796-8095-CharterLIFE 5796-8095-CharterLIFE 5796-8095-CharterLIFE	3900-PF Benefit Adjustments 3900-PF Benefit Adjustments 3900-PF Benefit Adjustments 3900-PF Benefit Adjustments 3900-PF Benefit Adjustments 3900-PF Benefit Adjustments 3900-PF Benefit Adjustments 3900-PF Benefit Adjustments 3900-PF Benefit Adjustments 3900-PF Benefit Adjustments	EFT EFT EFT EFT EFT EFT EFT EFT EFT EFT	2013600512 2013600512 2013600512 2013600512 2013600512 2013600512 2013600512 2013600512 2013600512 2013600512	122,076.77 132,076.77 111,076.77 132,076.77 111,076.77 132,076.77 111,076.77 132,076.77 111,076.77 132,076.77	67,530.01 9.64 3.32 134.60 649.19 2,523.31 4,949.78 345.40	000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts 000-Schoolwide-Revenues/OS Accounts	2073-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner
6/16/2025	6/2/2025	B-261008706	6139-Nora's Art Studio	5880-Instructional Vendors B	EFT	164680	140.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	5/30/2025	B-261008083	1391-United States Karate Organization, Inc	5880-Instructional Vendors B	EFT	164671	139.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	5/28/2025	B-261008089	6642-Wyaco Education Centers LLC	5880-Instructional Vendors B	EFT	164609	138.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	5/30/2025	B-261008812	6042-PI 2 Bar Fine LLC	5880-Instructional Vendors B	EFT	164630	130.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	5/20/2025	70180	1342-La Strada Publishing, LLP 1243-Jacobi Publishing, LLC	4100-Textbooks & Core Curricu 4100-Textbooks & Core Curricu	EFT EFT	164916 164919	111.13 111.32	910-Elementary Education	384-L-Personal Academic Charter School - Warner 2073-Excel Academy Charter School - Healdstate	
6/16/2025	3/26/2025	1953	v355-Green Kid Crafts	4100-Textbooks & Core Curricu	EFT	164979	103.26	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	6/4/2025	B-261008162	6522-California School of Classical Ballet	5880-Instructional Vendors B	EFT	164652	70.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	5/20/2025	16205-0052	6118-School and College Local Services of 6118-School and College Local Services of	5875-Professional Development 5875-Professional Development	EFT EFT	164672 164912	45.00 17.10	910-Social Education 910-Social Education	2073-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/16/2025	2/17/2025	2610041343	1323-Drawn Writer, LLC	4100-Textbooks & Core Curricu	EFT	164613	39.85	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	6/11/2025	00002607-0001	5798-The Cadet School	5880-Instructional Vendors B	EFT	164712	35.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	6/10/2025	B-261008043	2041-Yamaha Music Academy of Fountain 5902-Waterworks Swim School Diamond #	5880-Instructional Vendors B 5880-Instructional Vendors B	EFT EFT	164705 164656	237.00 227.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner 2073-Excel Academy Charter School - Healdstate	
6/16/2025	6/11/2025	B-261010401	5902-Waterworks Swim School Diamond #	5880-Instructional Vendors B	EFT	164656	227.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/22/2025	0078303675	1196-Sewany Learning Centers LLC 1196-Sewany Learning Centers LLC 1196-Sewany Learning Centers LLC 1196-Sewany Learning Centers LLC	4100-Textbooks & Core Curricu 4100-Textbooks & Core Curricu 4100-Textbooks & Core Curricu 4100-Textbooks & Core Curricu	EFT EFT EFT EFT	164615 164615 164615 164615	220.56 220.56 220.56 220.56	910-Elementary Education 910-Elementary Education 910-Elementary Education 910-Elementary Education	2053-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner	
6/16/2025	5/21/2025	407916706	1196-Sewany Learning Centers LLC 1196-Sewany Learning Centers LLC 1196-Sewany Learning Centers LLC	4100-Textbooks & Core Curricu 4100-Textbooks & Core Curricu 4100-Textbooks & Core Curricu	EFT EFT EFT	164615 164615 164615	220.56 220.56 220.56	910-Elementary Education 910-Elementary Education 910-Elementary Education	2053-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner	
6/16/2025	6/10/2025	B-261008079	6460-Holston Star Photography	5880-Instructional Vendors B	EFT	164647	210.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	5/29/2025	A-361569091	6761-West Coast Art Media Montage	988L-Instructional Vendors B	EFT	164874	199.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/16/2025	6/9/2025	115046115001	A671-William M. Kiser	4100-Textbooks & Core Curricu	EFT	164677	180.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/16/2025	5/18/2025	A-361569081	A14.L.A. Bar LLP	988L-Instructional Vendors B	EFT	164614	180.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/16/2025	5/29/2025	B-261008728	6388-Sandlot Tennis Center Inc.	5880-Instructional Vendors B	EFT	164665	175.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	5/8/2025	B-261008882	6147-KO Futuro	5880-Instructional Vendors B	EFT	164643	175.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/21/2025	538706	1208-Simmons Math Inc 1208-Simmons Math Inc	4100-Textbooks & Core Curricu 4100-Textbooks & Core Curricu	EFT EFT	164604 164604	174.00 161.41	910-Elementary Education 910-Elementary Education	2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner	
6/16/2025	5/19/2025	A-361569096	A176-The Fellowship Movement	988L-Instructional Vendors B	EFT	164678	173.74	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/16/2025	6/9/2025	A-361569097	*1113-UTMA William Pharesworth Mantal #	5880-Instructional Vendors B	EFT	164720	167.00	910-Instructional Funds	384-L-Personal Academic Charter School - Healdstate	
6/16/2025	5/27/2025	174	5302-Little Earth Therapy Center 5302-Little Earth Therapy Center	5100-Self-Consultants and Ven 5100-Self-Consultants and Ven	EFT EFT	164710 164624	160.00 158.55	907-Social Education 910-Elementary Education	2073-Excel Academy Charter School - Healdstate 2053-Excel Academy Charter School - Warner	
6/16/2025	5/27/2025	31195	3033-Essential in Writing 3033-Essential in Writing	4100-Textbooks & Core Curricu 4100-Textbooks & Core Curricu	EFT EFT	164624 164624	148.48 141.91	910-Elementary Education 910-Elementary Education	2053-Excel Academy Charter School - Warner 2053-Excel Academy Charter School - Warner	
6/16/2025	5/22/2025	A-361569094	6911-Gloria Leanne Ponce Marrs	988L-Instructional Vendors B	EFT	164871	140.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/16/2025	5/19/2025	A-361569096	A373-USA of Greater Iowa Reach	988L-Instructional Vendors B	EFT	164918	141.71	910-Instructional Funds	384-L-Personal Academic Charter School - Healdstate	
6/16/2025	5/26/2025	A-361569097	A618-The Mobile Music Professor	988L-Instructional Vendors B	EFT	164874	141.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/16/2025	6/2/2025	B-261008702	5888-Master Jim's Sky Martial Arts	5880-Instructional Vendors B	EFT	164932	130.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	6/1/2025	B-261008201	2092-Wild Elm Gymnastics	5880-Instructional Vendors B	EFT	164622	316.20	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	6/9/2025	284266125	1376-EMF Sports USA, Inc.	5100-Self-Consultants and Ven	EFT	164939	315.00	910-Social Education	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/28/2025	B-261008722	2357-Bucklers of Tomorrow, Inc - Norman	5880-Instructional Vendors B	EFT	164669	310.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	6/4/2025	B-261008076	6215-San Clemente Gymnastics Club 6215-San Clemente Gymnastics Club	5880-Instructional Vendors B 5880-Instructional Vendors B	EFT EFT	164653 164653	302.00 300.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate 384-L-Personal Academic Charter School - Warner	
6/16/2025	6/4/2025	B-261008697	6567-Graie Humata Hermet	5880-Instructional Vendors B	EFT	164703	300.00	910-Instructional Funds	2073-Excel Academy Charter School - Warner	
6/16/2025	6/6/2025	B-261008010	5899-Elite Dance Academy of Orange Cou	5880-Instructional Vendors B	EFT	164934	300.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	6/11/2025	B-261010403	6640-Waterworks Swim School La Verne	5880-Instructional Vendors B	EFT	164708	295.20	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/23/2025	B-261008813	1763-Wr Shark Learning	5880-Instructional Vendors B	EFT	164651	288.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/29/2025	B-261008784	3702-The Cadet School Mission Vets	5880-Instructional Vendors B	EFT	164626	279.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	5/26/2025	B-261008763	165222-The Cleverest Club	5880-Instructional Vendors B	EFT	164671	276.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/20/2025	B-261008733	6430-Steel Gates	5880-Instructional Vendors B	EFT	164607	265.00	910-Instructional Funds	2053-Excel Academy Charter School - Warner	
6/16/2025	6/4/2025	B-261008157	6185-Akate Dance Center LLC	5880-Instructional Vendors B	EFT	164643	264.54	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/15/2025	A-361569086	5473-Tyler Schmick Video Studio	988L-Instructional Vendors B	EFT	164876	264.00	910-Instructional Funds	384-L-Personal Academic Charter School - Healdstate	
6/16/2025	5/28/2025	A-361569091	A176-Scoutland	988L-Instructional Vendors B	EFT	164704	260.00	910-Instructional Funds	384-L-Personal Academic Charter School - Warner	
6/16/2025	5/31/2025	4904	6193-Lisa and Scott Phelan, Inc	5100-Self-Consultants and Ven	EFT	164641	260.00	907-Social Education	2073-Excel Academy Charter School - Healdstate	
6/16/2025	6/11/2025	A-361569105	643-Waterworks Swim School Silverlake	988L-Instructional Vendors B	EFT	164673	261.00	910-Instructional Funds	384-L-Personal Academic Charter School - Healdstate	
6/16/2025	6/2/2025	B-261008804	2211-Wade's Match Music	5880-Instructional Vendors B	EFT	164698	240.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/19/2025	B-261008709	6489-Rainbow Skate Society LLC	5880-Instructional Vendors B	EFT	164700	675.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/21/2025	B-261008203	v3204-Yamaha Music Academy of Fullerton	5880-Instructional Vendors B	EFT	164939	656.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	5/22/2025	579042425	5326-Manhail Ketchum	5100-Self-Consultants and Ven	EFT	164650	644.00	910-Social Education	2053-Excel Academy Charter School - Warner	
6/16/2025	5/23/2025	579042426	5326-Manhail Ketchum	5100-Self-Consultants and Ven	EFT	164650	644.00	910-Social Education	2053-Excel Academy Charter School - Warner	
6/16/2025	5/22/2025	2453249245	5326-Manhail Ketchum	5100-Self-Consultants and Ven	EFT	164650	644.00	910-Social Education	2073-Excel Academy Charter School - Warner	
6/16/2025	6/3/2025	B-261008695	6125-Eliza Jo Juice Incorporated	5880-Instructional Vendors B	EFT	164694	560.00	910-Instructional Funds	2073-Excel Academy Charter School - Healdstate	
6/16/2025	6/9/2025	A-361569095	A116-Brian Roman Piano Studio							

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 11, 2025 at 9:40 AM

Table with columns for Date, Meeting, Description, Amount, Status, and Category. Contains multiple rows of financial entries.



6/30/2025	6/17/2025	B-261010367	4156 - Grace Barnes Stein Clemente	5880 - Instructional Vendors &	EFF	104716	289.00	289.00			910 - Instructional Funds	2053 - Excel Academy Charter School - Warner
6/30/2025	12/29/2024	SHQP2446533211	6177 - Chroma Labs LLC	4120 - Materials & Supplies	EFF	104721	96.81	96.81			910 - Instructional Funds	2073 - Excel Academy Charter School - Helenfeld
6/30/2025	5/22/2025	2450240525	5206 - Marshall Ketchum	5100 - Self Consultants and Ven	EFF	104718	92.00	92.00	Veith Theresa Mae 25		907 - Social Education	2073 - Excel Academy Charter School - Helenfeld
6/30/2025	6/19/2025	10524	2699 - Nishle The Lady Lads , LLC	4100 - Textbooks & Core Curricu	EFF	104740	79.00	79.00			910 - Instructional Funds	2073 - Excel Academy Charter School - Helenfeld
6/30/2025	6/11/2025	B-261010381	2717-A - Tree of Knowledge Educational Ser	5880 - Instructional Vendors &	EFF	104731	55.00	55.00			910 - Instructional Funds	2073 - Excel Academy Charter School - Helenfeld
6/30/2025	5/30/2025	1 104746-11	1191 - McGraw Hill 111	4190 - Textbooks & Core Curricu	EFF	104746	61.67	61.67			916 - Elementary Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/18/2025	91036017	2214 - Lakeshore Learning Materials	4120 - Materials & Supplies	EFF	104743	55.94	55.94			910 - Instructional Funds	2053 - Excel Academy Charter School - Warner
6/30/2025	6/10/2025	90982935	2214 - Lakeshore Learning Materials	4120 - Materials & Supplies	EFF	104743	50.94	50.94			910 - Instructional Funds	2053 - Excel Academy Charter School - Warner
6/30/2025	5/9/2025	40884	5257 - Jump and Shoot Therapy, Inc.	5100 - Self Consultants and Ven	EFF	104715	48.75	48.75	Seoeth Services Mar 25		907 - Social Education	2053 - Excel Academy Charter School - Warner
6/30/2025	6/23/2025	00289760V3P	6501 - Mind and Bloom Learning	4100 - Textbooks & Core Curricu	EFF	104729	15.94	15.94			910 - Instructional Funds	2073 - Excel Academy Charter School - Helenfeld
6/30/2025	5/30/2025	0255128-2N	5920 - Arvy Jones Educational Solutions	4120 - Materials & Supplies	EFF	104727	124,376.20	69,235.20			915 - Technology	2053 - Excel Academy Charter School - Warner
6/30/2025	6/9/2025	025615-2N	5920 - Arvy Jones Educational Solutions	4120 - Materials & Supplies	EFF	104727	124,376.20	1,678.05			915 - Technology	2053 - Excel Academy Charter School - Warner
6/30/2025	4/29/2025	9693469500	1151 - Anale Inc	4120 - Materials & Supplies	EFF	104713	35,459.71	21,049.11			915 - Technology	2053 - Excel Academy Charter School - Warner
6/30/2025	5/28/2025	96874567834	1151 - Anale Inc	4120 - Materials & Supplies	EFF	104721	19,416.71	17,901.67			915 - Technology	2073 - Excel Academy Charter School - Warner
5/29/2025	5/29/2025	HW148 HW148	1151 - Anale Inc	4120 - Materials & Supplies	EFF	104715	35,459.71	565.64	Heather Pernic		915 - Technology	2073 - Excel Academy Charter School - Warner
6/30/2025	6/2/2025	23169	6412 - Institute for Multi-Sensory Education	5895 - Professional Development	EFF	104723	10,800.00	4,104.00			907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/17/2025	6686-061215	6686 - University of La Verne	5895 - Professional Development	EFF	104747	8,200.00	5,146.00			916 - Elementary Education	2053 - Excel Academy Charter School - Warner
6/30/2025	5/31/2025	2V00007876	6754 - Asant Panda LLC	5830 - Non-Instructional Softwa	EFF	104735	6,006.25	2,824.28			909 - Business Services	2073 - Excel Academy Charter School - Warner
6/30/2025	5/11/2025	FP11012014	6176 - Qualitative Therapy Services - Inc	5100 - Self Consultants and Ven	EFF	104719	4,167.93	499.89			900 - Schoolwide - Revenues/RS Accounts	2073 - Excel Academy Charter School - Warner
6/30/2025	5/11/2025	EX2101-0525	5739 - Specialist Therapy Services, Inc.	5100 - Self Consultants and Ven	EFF	104722	4,162.50	332.50	Counseling Services Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	2/28/2025	EX2101-0225	5739 - Specialist Therapy Services, Inc.	5100 - Self Consultants and Ven	EFF	104722	4,162.50	217.50	Sweeney & AT Services April & Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/16/2025	5460-073125	5460 - Hensler Insurance Group	9330 - Prepaid Expenses	EFF	104756	4,021.00	2,493.02	AT & OT Services Jan-Feb 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/1/2025	68949382	6015 - Granite Telecommunications	5910 - Telephone	EFF	104720	3,649.85	1,386.94			912 - Administration/Office	2073 - Excel Academy Charter School - Warner
6/30/2025	3/9/2025	HW1746876	6015 - Granite Telecommunications	5910 - Telephone	EFF	104720	1,649.95	7,763.61			912 - Administration/Office	2073 - Excel Academy Charter School - Warner
6/30/2025	5/28/2025	6125-1035	6125 - TruLink, LLC	5940 - Technology Services	EFF	104732	3,200.00	1,130.00			912 - Administration/Office	2073 - Excel Academy Charter School - Warner
6/30/2025	5/29/2025	26084	6413 - NordBinl Corp	9330 - Prepaid Expenses	EFF	104724	2,362.50	1,464.75			900 - Schoolwide - Revenues/RS Accounts	2053 - Excel Academy Charter School - Warner
6/30/2025	6/18/2025	1376792	5912 - eMarket, Inc.	5841 - Community Marketing	EFF	104726	2,047.64	1,269.54			912 - Marketing	2073 - Excel Academy Charter School - Warner
6/30/2025	5/11/2025	11817	1163 - Effical Educational Consultants Ser	5100 - Self Consultants and Ven	EFF	104717	1,995.10	904.00			907 - Social Education	2053 - Excel Academy Charter School - Warner
6/30/2025	6/20/2025	79546	1163 - Effical Educational Consultants Ser	5100 - Self Consultants and Ven	EFF	104717	1,995.20	234.00	AT & OT Services Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/20/2025	79545	1163 - Effical Educational Consultants Ser	5100 - Self Consultants and Ven	EFF	104717	1,995.20	336.00	AT & OT Services Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/24/2025	1193647	6411 - Total Education Solutions	5100 - Self Consultants and Ven	EFF	104741	1,768.75	649.00	PT Services Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/25/2025	17192	5208 - Mohr & Cossato, Attorneys-at-Law	5810 - Legal	EFF	104730	1,624.50	262.26	Parsons & APE Services Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/25/2025	17191	5208 - Mohr & Cossato, Attorneys-at-Law	5810 - Legal	EFF	104730	1,624.50	162.26	APE and OT Service Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/25/2025	17190	5208 - Mohr & Cossato, Attorneys-at-Law	5810 - Legal	EFF	104730	1,624.50	372.00			912 - Administration/Office	2073 - Excel Academy Charter School - Warner
6/30/2025	6/25/2025	17189	5208 - Mohr & Cossato, Attorneys-at-Law	5810 - Legal	EFF	104730	1,624.50	171.27			912 - Administration/Office	2073 - Excel Academy Charter School - Warner
6/30/2025	6/18/2025	B-2610103816	6160 - Gabriel Jacob	5880 - Instructional Vendors &	EFF	104742	1,200.00	57.00			910 - Instructional Funds	2053 - Excel Academy Charter School - Warner
6/30/2025	6/12/2025	1210374	6451 - Risk Connection Developmental Th	5100 - Self Consultants and Ven	EFF	104720	846.25	303.75	OT Services April 25		907 - Social Education	2053 - Excel Academy Charter School - Warner
6/30/2025	5/7/2025	B-261001909	3306 - Backstars of Tomorrow, Inc. - Chico	5880 - Instructional Vendors &	EFF	104713	805.00	805.00			910 - Instructional Funds	2073 - Excel Academy Charter School - Helenfeld
6/30/2025	6/11/2025	B-261010384	1424 - California Gymnastics, LLC	5880 - Instructional Vendors &	EFF	104725	800.00	115.00			910 - Instructional Funds	2073 - Excel Academy Charter School - Helenfeld
6/30/2025	6/19/2025	A-14-1061910017	A14 - Waterworks Kinesio School Phos Heils	5880 - Instructional Vendors &	EFF	104729	747.44	747.44			910 - Instructional Funds	2053 - Excel Academy Charter School - Warner
6/30/2025	6/12/2025	434	5775 - Link in Motion Pediatric Therapy	5100 - Self Consultants and Ven	EFF	104744	598.75	598.75	OT Services Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/14/2025	90765118	5113 - LogiCopy	5800 - Professional Services -	EFF	104739	478.25	181.03	Seoeth Services Mar 25		907 - Social Education	2073 - Excel Academy Charter School - Warner
6/30/2025	6/19/2025	B-261011216	6567 - Grace Hamate Helmet	5880 - Instructional Vendors &	EFF	104738	460.00	460.00			910 - Instructional Funds	2053 - Excel Academy Charter School - Warner
6/30/2025	6/11/2025	B-261010389	1084 - Backstars of Tomorrow Riverside	5880 - Instructional Vendors &	EFF	104748	385.00	165.00			910 - Instructional Funds	2053 - Excel Academy Charter School - Warner
6/30/2025	6/10/2025	B-261010380	1084 - Backstars of Tomorrow Riverside	5880 - Instructional Vendors &	EFF	104748	385.00	250.00			910 - Instructional Funds	2053 - Excel Academy Charter School - Warner

Total for CHASE 9131

\*\*\*\*\* 1,125,356.42

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

Bank: CHASE 9313 - Chase Bank
Account no: 215799113
Date: 6/19/2025
Bill no.: 8-261061107
Vendor: 6378-The Rok Music Academy

Table with columns: Date, Bill no., Vendor, GL account or account label, Method, Document no., Amount, Amount applied, Memo, Department, Location. Contains multiple rows of financial transactions.

Table with columns: Date, Bill no., Vendor, GL account or account label, Method, Document no., Amount, Amount applied, Memo, Department, Location. Contains multiple rows of financial transactions.

Table with columns: Date, Bill no., Vendor, GL account or account label, Method, Document no., Amount, Amount applied, Memo, Department, Location. Contains multiple rows of financial transactions.

Table with columns: Date, Bill no., Vendor, GL account or account label, Method, Document no., Amount, Amount applied, Memo, Department, Location. Contains multiple rows of financial transactions.

Table with columns: Date, Bill no., Vendor, GL account or account label, Method, Document no., Amount, Amount applied, Memo, Department, Location. Contains multiple rows of financial transactions.

**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	Memo	Department	Location
<b>CHASE 9313 - Chase Bank</b>	<b>Account no: 215769313</b>											
	8/11/2025	7/16/2025	1212946	1148--Institute for Excellence in Writing	4100--Textbooks & Core Curricu	EFT	20136006787	564.50	338.22		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/16/2025	1212642	1148--Institute for Excellence in Writing	4100--Textbooks & Core Curricu	EFT	20136006787	564.50	226.28		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/18/2025	1513407	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006777	563.68	563.68		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/15/2025	208440	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	104802	539.84	269.38		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/17/2025	208463	2074--Thinkwell Corporation	4100--Textbooks & Core Curricu	EFT	104802	539.84	270.46		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/17/2025	22359	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	28.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/15/2025	22307	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	28.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/15/2025	22308	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	65.53		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/15/2025	22305	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	46.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/15/2025	22337	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	111.52		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/15/2025	22303	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	28.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/15/2025	22339	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	28.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/15/2025	22338	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	28.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/16/2025	22345	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	30.99		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		7/16/2025	22355	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	86.23		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/15/2025	22304	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104810	515.20	28.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	6/12/2025	23108	5780--Balloons by Jenn	5841--Community Marketing	EFT	20136006775	475.00	180.50		914--Community Engagement	2073--Excel Academy Charter School - Helendale
				5780--Balloons by Jenn	5841--Community Marketing	EFT	20136006775	475.00	294.50		914--Community Engagement	2053--Excel Academy Charter School - Warner
	8/11/2025	7/6/2025	1GCV-DM9X-3XC7	1925--Amazon Capital Services, Inc.	4320--Office Supplies	EFT	20136006774	456.69	172.20		912--Administration/Office	2053--Excel Academy Charter School - Warner
				1925--Amazon Capital Services, Inc.	4320--Office Supplies	EFT	20136006774	456.69	105.55		912--Administration/Office	2073--Excel Academy Charter School - Helendale
		7/2/2025	1HVW-R7YV-9WPR	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006774	456.69	52.42		914--Community Engagement	2073--Excel Academy Charter School - Helendale
				1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006774	456.69	85.52		914--Community Engagement	2053--Excel Academy Charter School - Warner
		7/8/2025	1QVR-JN3T-4PD1	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006774	456.69	32.31		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/13/2025	1GY4-4RK1-HFMC	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006774	456.69	8.69		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/17/2025	46376	5257--Jump and Schout Therapy, Inc.	5100--SpEd Consultants and Ven	EFT	104790	422.50	422.50	ESY Speech Services June/July 25	907--Special Education	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/1/2025	14707	5017--Alpha Vision, Inc.	5940--Technology Services	EFT	104794	379.00	144.02		912--Administration/Office	2073--Excel Academy Charter School - Helendale
				5017--Alpha Vision, Inc.	5940--Technology Services	EFT	104794	379.00	234.98		912--Administration/Office	2053--Excel Academy Charter School - Warner
	8/11/2025	7/15/2025	35337	2445--Beautiful Feet Books, Inc.	4100--Textbooks & Core Curricu	EFT	104808	345.53	345.53		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/23/2025	C241806	2538--Memoria Press	4100--Textbooks & Core Curricu	EFT	104821	341.82	113.70		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/23/2025	C241807	2538--Memoria Press	4100--Textbooks & Core Curricu	EFT	104821	341.82	124.02		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/14/2025	C241657	2538--Memoria Press	4100--Textbooks & Core Curricu	EFT	104821	341.82	104.10		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/16/2025	933061	5016--All About Learning Press, Inc	4100--Textbooks & Core Curricu	EFT	104807	334.60	215.31		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/14/2025	933002	5016--All About Learning Press, Inc	4100--Textbooks & Core Curricu	EFT	104807	334.60	63.77		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		7/15/2025	933033	5016--All About Learning Press, Inc	4100--Textbooks & Core Curricu	EFT	104807	334.60	55.52		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/15/2025	522913	3031--Essentials in Writing	4100--Textbooks & Core Curricu	EFT	104784	310.00	158.05		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		7/15/2025	411109	3031--Essentials in Writing	4100--Textbooks & Core Curricu	EFT	104784	310.00	151.95		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/15/2025	SI-246858	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	104787	302.98	252.36		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/16/2025	SI-247052	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	104787	302.98	50.62		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	8/1/2025	S2019589-0825	5229--Irvine Spectrum Portfolio LLC	5610--Facility Rents & Leases	EFT	104806	293.81	111.65		912--Administration/Office	2073--Excel Academy Charter School - Helendale
				5229--Irvine Spectrum Portfolio LLC	5610--Facility Rents & Leases	EFT	104806	293.81	182.16		912--Administration/Office	2053--Excel Academy Charter School - Warner
	8/11/2025	7/22/2025	1903191978	5664--Infinity Kids Corporation	5100--SpEd Consultants and Ven	EFT	104816	286.00	286.00	ESY PT Services June 25	907--Special Education	2053--Excel Academy Charter School - Warner
	8/11/2025	7/14/2025	B3041	3167--Waseca Biomes	4100--Textbooks & Core Curricu	EFT	20136006781	185.00	185.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/16/2025	679221	1179--Home Science Tools	4310--Materials & Supplies	EFT	104824	131.80	131.80		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/15/2025	307527	2899--Mystery Science, Inc.	4100--Textbooks & Core Curricu	EFT	104798	129.00	129.00		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	6/5/2025	INV-0014	6556--Mrs. Wordsmith USA LLC	4310--Materials & Supplies	EFT	104796	99.95	64.96		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		6/5/2025	INV-0013	6556--Mrs. Wordsmith USA LLC	4310--Materials & Supplies	EFT	104796	99.95	34.99		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/18/2025	1213	4224--Curiosity Chronicles	4100--Textbooks & Core Curricu	EFT	20136006784	98.00	98.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/23/2025	21867	1278--Blackbird and Company	4100--Textbooks & Core Curricu	EFT	104811	77.06	77.06		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/14/2025	INV2317916	1321--Art of Problem Solving	4100--Textbooks & Core Curricu	EFT	20136006786	73.28	73.28		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/15/2025	IN-7561	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104819	57.99	57.99		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/14/2025	238136A	1167--The Critical Thinking Co.	4100--Textbooks & Core Curricu	EFT	20136006782	47.49	47.49		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/14/2025	63375	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	EFT	104793	45.95	45.95		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/15/2025	22325	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104792	41.99	41.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/15/2025	S375176	1208--Singapore Math Inc	4100--Textbooks & Core Curricu	EFT	104789	28.95	28.95		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	8/11/2025	7/14/2025	91197700	2114--Lakeshore Learning Materials	4310--Materials & Supplies	EFT	104783	24.54	24.54		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	8/11/2025	7/21/2025	1517023	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	541.16		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/23/2025	1520429	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	230.08		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/21/2025	1514218	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	74.19		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/21/2025	1517020	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	90.58		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/22/2025	1517674	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	121.59		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/21/2025	1517114	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	189.95		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/22/2025	1517670	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	152.04		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/22/2025	1517034	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	189.29		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		7/18/2025	1513444	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	145.75		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
		7/22/2025	1516979	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	81.06		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/21/2025	1517002	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	28.75		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/21/2025	1516951	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	254.53		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/21/2025	1517150	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	163.82		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/22/2025	1517026	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	81.06		910--Instructional Funds	2053--Excel Academy Charter School - Warner
		7/21/2025	1517124	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006780	8,245.35	249.79		910--Instructional Funds	2053--Excel Academy Charter School - Warner





	7/16/2025	499750	3031--Essentials in Writing	4100--Textbooks & Core Curricu	EFT	104799	3,368.30	736.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/16/2025	377697	3031--Essentials in Writing	4100--Textbooks & Core Curricu	EFT	104799	3,368.30	368.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	533296	3031--Essentials in Writing	4100--Textbooks & Core Curricu	EFT	104799	3,368.30	137.05		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
8/11/2025	7/15/2025	14050502	5911--4Imprint, Inc.	5841--Community Marketing	EFT	104812	2,316.12	880.13		913--Marketing	2073--Excel Academy Charter School - Helendale
			5911--4Imprint, Inc.	5841--Community Marketing	EFT	104812	2,316.12	1,435.99		913--Marketing	2053--Excel Academy Charter School - Warner
8/11/2025	6/5/2025	D480832C-0011	6554--ClassPass	5300--Dues & Memberships	EFT	104791	2,076.00	788.88		901--Human Resources	2073--Excel Academy Charter School - Helendale
			6554--ClassPass	5300--Dues & Memberships	EFT	104791	2,076.00	1,287.12		901--Human Resources	2053--Excel Academy Charter School - Warner
8/11/2025	7/8/2025	SIN029586	6774--Amira Learning, Inc.	5878--Student Assessment	EFT	104813	1,996.00	758.48		903--Assessment	2073--Excel Academy Charter School - Helendale
			6774--Amira Learning, Inc.	5878--Student Assessment	EFT	104813	1,996.00	1,237.52		903--Assessment	2053--Excel Academy Charter School - Warner
8/11/2025	7/8/2025	6891815	6260--Quarles & Brady, LLP	5810--Legal	EFT	20136006773	1,776.00	674.88		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			6260--Quarles & Brady, LLP	5810--Legal	EFT	20136006773	1,776.00	1,101.12		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/11/2025	7/15/2025	75821	1224--Oak Meadow Inc	4100--Textbooks & Core Curricu	EFT	104800	1,544.38	248.28		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	75836	1224--Oak Meadow Inc	4100--Textbooks & Core Curricu	EFT	104800	1,544.38	241.41		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	75820	1224--Oak Meadow Inc	4100--Textbooks & Core Curricu	EFT	104800	1,544.38	232.12		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	75846	1224--Oak Meadow Inc	4100--Textbooks & Core Curricu	EFT	104800	1,544.38	822.57		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/11/2025	7/20/2025	9216	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104823	1,407.35	199.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9177	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104823	1,407.35	169.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/20/2025	9215	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104823	1,407.35	239.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/20/2025	9222	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104823	1,407.35	358.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9210	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104823	1,407.35	323.85		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/21/2025	9233	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104823	1,407.35	114.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/11/2025	7/24/2025	23113	5780--Balloons by Jenn	4330--Meals & Events	EFT	20136006789	1,330.00	505.40		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			5780--Balloons by Jenn	4330--Meals & Events	EFT	20136006789	1,330.00	824.60		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/11/2025	8/1/2025	94ZDDUIL-0001	5544--Law Offices of Young, Minney & Corr, LLP	5895--Professional Development	EFT	104801	945.00	359.10	Megan Anderson	901--Human Resources	2073--Excel Academy Charter School - Helendale
			5544--Law Offices of Young, Minney & Corr, LLP	5895--Professional Development	EFT	104801	945.00	585.90	Megan Anderson	901--Human Resources	2053--Excel Academy Charter School - Warner
8/11/2025	7/28/2025	938689	5363--Procopio, Cory, Hargreaves & Savitch LLP	5810--Legal	EFT	104797	827.70	314.53		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			5363--Procopio, Cory, Hargreaves & Savitch LLP	5810--Legal	EFT	104797	827.70	513.17		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/11/2025	8/1/2025	INV122303	5567--Vector Solutions	5895--Professional Development	EFT	20136006785	786.00	298.68		901--Human Resources	2073--Excel Academy Charter School - Helendale
			5567--Vector Solutions	5895--Professional Development	EFT	20136006785	786.00	487.32		901--Human Resources	2053--Excel Academy Charter School - Warner
8/11/2025	7/18/2025	1V69-WNP3-RN7G	1925--Amazon Capital Services, Inc.	4320--Office Supplies	EFT	20136006788	774.15	31.72		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			1925--Amazon Capital Services, Inc.	4320--Office Supplies	EFT	20136006788	774.15	51.76		912--Administration/Office	2053--Excel Academy Charter School - Warner
	7/13/2025	13V6-WNLJ-HCK1	1925--Amazon Capital Services, Inc.	4320--Office Supplies	EFT	20136006788	774.15	4.25		912--Administration/Office	2073--Excel Academy Charter School - Helendale
	7/14/2025	17RC-313C-6166	1925--Amazon Capital Services, Inc.	4320--Office Supplies	EFT	20136006788	774.15	6.94		912--Administration/Office	2053--Excel Academy Charter School - Warner
	7/8/2025	1DTD-4PYW-3FF3	1925--Amazon Capital Services, Inc.	4320--Office Supplies	EFT	20136006788	774.15	11.05		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			1925--Amazon Capital Services, Inc.	4320--Office Supplies	EFT	20136006788	774.15	18.02		912--Administration/Office	2053--Excel Academy Charter School - Warner
			1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006788	774.15	83.79		915--Technology	2073--Excel Academy Charter School - Helendale
	7/13/2025	13HT-3MFG-KL13	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006788	774.15	136.70		914--Community Engagement	2053--Excel Academy Charter School - Warner
			1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006788	774.15	163.37		914--Community Engagement	2073--Excel Academy Charter School - Helendale
				4310--Materials & Supplies	EFT	20136006788	774.15	266.55		914--Community Engagement	2053--Excel Academy Charter School - Warner
8/11/2025	6/3/2025	2025-0382	4303--Mobile Zoo of Southern California	5841--Community Marketing	EFT	104795	749.00	284.62		914--Community Engagement	2073--Excel Academy Charter School - Helendale
			4303--Mobile Zoo of Southern California	5841--Community Marketing	EFT	104795	749.00	464.38		914--Community Engagement	2053--Excel Academy Charter School - Warner
8/11/2025	7/15/2025	SI-246860	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	104809	703.61	55.68		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/18/2025	SI-247512	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	104809	703.61	253.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/14/2025	SI-246767	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	104809	703.61	39.56		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	SI-246872	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	104809	703.61	220.14		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/14/2025	SI-246763	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	104809	703.61	27.56		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/16/2025	SI-247074	1978--The Logic of English	4100--Textbooks & Core Curricu	EFT	104809	703.61	106.68		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/11/2025	6/30/2025	80982	5353--Partners in Special Education	5100--SpEd Consultants and Ven	EFT	104814	675.00	135.00	ESY PT Services June 25	907--Special Education	2073--Excel Academy Charter School - Helendale
			5353--Partners in Special Education	5100--SpEd Consultants and Ven	EFT	104814	675.00	540.00	ESY APE Services June 25	907--Special Education	2053--Excel Academy Charter School - Warner
8/11/2025	7/14/2025	308555	1293--Beyond the Page	4100--Textbooks & Core Curricu	EFT	104786	673.16	487.11		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/14/2025	308554	1293--Beyond the Page	4100--Textbooks & Core Curricu	EFT	104786	673.16	186.05		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/11/2025	7/25/2025	422369-1	5513--Promo Shop Inc.	5841--Community Marketing	EFT	104818	599.38	227.76		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			5513--Promo Shop Inc.	5841--Community Marketing	EFT	104818	599.38	371.62		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/11/2025	7/8/2025	5359-070825	5359--Pitney Bowes	5930--Postage	EFT	20136006776	401.00	152.38		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			5359--Pitney Bowes	5930--Postage	EFT	20136006776	401.00	248.62		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/11/2025	7/31/2025	18798210	5296--LEAF	5620--Equipment Leases	EFT	104817	143.86	54.67		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			5296--LEAF	5620--Equipment Leases	EFT	104817	143.86	89.19		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/11/2025	7/10/2025	INV56481	5313--LogiCopy	5800--Professional Services -	EFT	104785	44.20	16.80		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			5313--LogiCopy	5800--Professional Services -	EFT	104785	44.20	27.40		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/11/2025	7/26/2025	00002E01V5305	1649--UPS	5930--Postage	EFT	20136006778	4.40	1.67		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			1649--UPS	5930--Postage	EFT	20136006778	4.40	2.73		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/18/2025	8/4/2025	725	5277--Kids in Motion Pediatric Therapy	5100--SpEd Consultants and Ven	EFT	104835	135.00	135.00	ESY Speech July 25	907--Special Education	2073--Excel Academy Charter School - Helendale
8/18/2025	7/15/2025	C241664	2538--Memoria Press	4100--Textbooks & Core Curricu	EFT	104830	124.58	124.58		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/18/2025	7/16/2025	7029091571	1196--Savvas Learning Company LLC	4100--Textbooks & Core Curricu	EFT	104836	118.09	45.80		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/22/2025	7029102314	1196--Savvas Learning Company LLC	4100--Textbooks & Core Curricu	EFT	104836	118.09	22.29		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/22/2025	7029102309	1196--Savvas Learning Company LLC	4100--Textbooks & Core Curricu	EFT	104836	118.09	50.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/18/2025	7/15/2025	071525-142	1270--Easy Grammar Systems	4100--Textbooks & Core Curricu	EFT	104833	71.08	71.08		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
8/18/2025	7/16/2025	22353	1243--JackKris Publishing, LLC	4100--Textbooks & Core Curricu	EFT	104850	28.99	28.99		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/18/2025	7/16/2025	INV-140-08958	5368--School Pathways, LLC	5830--Non-Instructional Softwa	EFT	104826	28,656.89	16,966.79		912--Administration/Office	2053--Excel Academy Charter School - Warner
	7/16/2025	INV-140-08959	5368--School Pathways, LLC	5830--Non-Instructional Softwa	EFT	104826	28,656.89	11,690.10		912--Administration/Office	2073--Excel Academy Charter School - Helendale
8/18/2025	7/22/2025	615770	5812--The Princeton Review	4101--Textbooks & Core Curricu	EFT	104825	23,625.00	8,977.50		917--Secondary Education	2073--Excel Academy Charter School - Helendale
			5812--The Princeton Review	4101--Textbooks & Core Curricu	EFT	104825	23,625.00	14,647.50		917--Secondary Education	2053--Excel Academy Charter School - Warner
8/18/2025	7/15/2025	308595	1293--Beyond the Page	4100--Textbooks & Core Curricu	EFT	104831	16,096.16	603.46		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	308597	1293--Beyond the Page	4100--Textbooks & Core Curricu	EFT	104831	16,096.16	1,251.28		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	308599	1293--Beyond the Page	4100--Textbooks & Core Curricu	EFT	104831	16,096.16	542.59		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/21/2025	308996	1293--Beyond the Page	4100--Textbooks & Core Curricu	EFT	104831	16,096.16	932.73		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/16/2025	308729	1293--Beyond the Page	4100--Textbooks & Core Curricu	EFT	104831	16,096.16	305.86		910--Instructional Funds	2053--Excel Academy Charter School - Warner



7/16/2025	679429	1179--Home Science Tools	4310--Materials & Supplies	EFT	104847	780.34	331.15		910--Instructional Funds	2053--Excel Academy Charter School - Warner	
7/16/2025	679208	1179--Home Science Tools	4310--Materials & Supplies	EFT	104847	780.34	135.04		910--Instructional Funds	2053--Excel Academy Charter School - Warner	
7/16/2025	679414	1179--Home Science Tools	4310--Materials & Supplies	EFT	104847	780.34	115.59		910--Instructional Funds	2053--Excel Academy Charter School - Warner	
8/18/2025	7/14/2025	14047949	5911--4Imprint, Inc. 5911--4Imprint, Inc. 5911--4Imprint, Inc.	5841--Community Marketing 9310--Due From - ASB 5841--Community Marketing	EFT EFT EFT	104840 104840 104840	729.88 729.88 729.88	217.00 379.88 133.00	914--Community Engagement 000--Schoolwide -Revenues/BS Accounts 914--Community Engagement	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
8/18/2025	7/16/2025	IN-7569	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104828	638.12	22.50	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/16/2025	IN-7573	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104828	638.12	199.08	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/21/2025	IN-7609	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104828	638.12	84.99	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/16/2025	IN-7575	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104828	638.12	93.99	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/16/2025	IN-7565	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104828	638.12	130.08	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/16/2025	IN-7566	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104828	638.12	44.99	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/16/2025	IN-7570	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104828	638.12	35.99	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/15/2025	IN-7563	1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu	EFT	104828	638.12	26.50	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
8/18/2025	7/20/2025	9217	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104842	601.50	199.90	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/22/2025	9243	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104842	601.50	225.75	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/15/2025	9170	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104842	601.50	175.85	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
8/18/2025	7/16/2025	308724	1293--Beyond the Page	4100--Textbooks & Core Curricu	EFT	104849	395.51	395.51	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
8/18/2025	7/15/2025	35269	2445--Beautiful Feet Books, Inc.	4100--Textbooks & Core Curricu	EFT	104845	321.01	321.01	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
8/18/2025	8/4/2025	2842665766	1376--EMH Sports USA, Inc.	5100--SpEd Consultants and Ven	EFT	104846	315.00	315.00	ESY APE Services Jun 25	907--Special Education	2073--Excel Academy Charter School - Helendale
8/18/2025	7/15/2025	933044	5016--All About Learning Press, Inc	4100--Textbooks & Core Curricu	EFT	104834	175.78	63.77	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/16/2025	933065	5016--All About Learning Press, Inc	4100--Textbooks & Core Curricu	EFT	104834	175.78	112.01	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
8/18/2025	7/17/2025	S375641	1208--Singapore Math Inc	4100--Textbooks & Core Curricu	EFT	104851	160.75	160.75	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
8/18/2025	7/8/2025	17326	5208--Hatch & Cesario, Attorneys-at-Law 5208--Hatch & Cesario, Attorneys-at-Law	5810--Legal 5810--Legal	EFT EFT	104848 104848	154.00 154.00	95.48 58.52	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
8/18/2025	7/22/2025	63566	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	EFT	104844	150.53	150.53	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
8/18/2025	8/12/2025	INV56890	5313--LogiCopy 5313--LogiCopy	5800--Professional Services - 5800--Professional Services -	EFT EFT	104837 104837	44.20 44.20	16.80 27.40	912--Administration/Office 912--Administration/Office	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
8/19/2025	7/15/2025	INV2317958	1321--Art of Problem Solving	4100--Textbooks & Core Curricu	EFT	20136006797	96.92	96.92	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
8/19/2025	7/15/2025	238187A	1167--The Critical Thinking Co.	4100--Textbooks & Core Curricu	EFT	20136006794	47.49	47.49	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
8/19/2025	7/18/2025	1513454	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	140.54	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1513488	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	184.89	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513534	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	173.68	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513729	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	732.48	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1513484	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	71.74	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517483	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	118.28	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1514036	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	82.76	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513536	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	245.24	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/21/2025	1517319	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	210.11	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513432	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	404.90	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513507	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	192.74	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517016	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	258.84	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1513543	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	47.31	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517220	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	30.49	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513596	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	82.76	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517093	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	92.00	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517354	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	36.27	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/21/2025	1517373	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	339.55	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1513421	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	289.32	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517097	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	219.67	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1514048	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	23.83	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1514049	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	130.86	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513554	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	177.74	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513718	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	271.85	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513989	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	53.78	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513916	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	154.20	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1513995	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	59.22	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513474	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	169.09	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/22/2025	1517384	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	45.21	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1514023	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	108.06	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513505	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	174.51	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/22/2025	1517345	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	84.63	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/22/2025	1517091	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	116.29	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517017	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	49.37	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1514029	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	190.75	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/22/2025	1517380	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	150.18	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1513452	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	319.89	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517506	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	745.96	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/21/2025	1517364	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	282.48	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/21/2025	1517355	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	80.95	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/22/2025	1517147	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	44.65	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513426	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	194.28	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513483	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	122.32	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513509	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	230.10	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517145	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	46.85	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/18/2025	1513527	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	119.29	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/21/2025	1514237	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	150.95	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/21/2025	1514276	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	68.74	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/18/2025	1514035	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	81.51	910--Instructional Funds	2073--Excel Academy Charter School - Helendale	
	7/22/2025	1517048	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT	20136006793	10,398.19	108.47	910--Instructional Funds	2053--Excel Academy Charter School - Warner	
	7/21/2025	1517243	1201--Rainbow Resource Center, Inc	4100--Textbooks & Core Curricu	EFT</						

	7/16/2025	B10058367	1295--BookShark, LLC	4100--Textbooks & Core Curricu	EFT	20136006791	6,729.79	972.24		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	B10058235	1295--BookShark, LLC	4100--Textbooks & Core Curricu	EFT	20136006791	6,729.79	309.19		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/16/2025	B10058389	1295--BookShark, LLC	4100--Textbooks & Core Curricu	EFT	20136006791	6,729.79	1,204.98		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	B10058238	1295--BookShark, LLC	4100--Textbooks & Core Curricu	EFT	20136006791	6,729.79	253.07		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	B10058225	1295--BookShark, LLC	4100--Textbooks & Core Curricu	EFT	20136006791	6,729.79	523.54		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/16/2025	B10058382	1295--BookShark, LLC	4100--Textbooks & Core Curricu	EFT	20136006791	6,729.79	567.38		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/16/2025	B10058485	1295--BookShark, LLC	4100--Textbooks & Core Curricu	EFT	20136006791	6,729.79	284.75		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/19/2025	8/5/2025	D480832C-0013	6554--ClassPass	5300--Dues & Memberships	EFT	20136006792	4,176.00	798.00		901--Human Resources	2073--Excel Academy Charter School - Helendale
			6554--ClassPass	5300--Dues & Memberships	EFT	20136006792	4,176.00	1,302.00		901--Human Resources	2053--Excel Academy Charter School - Warner
	7/7/2025	D480832C-0012	6554--ClassPass	5300--Dues & Memberships	EFT	20136006792	4,176.00	1,287.12		901--Human Resources	2053--Excel Academy Charter School - Warner
			6554--ClassPass	5300--Dues & Memberships	EFT	20136006792	4,176.00	788.88		901--Human Resources	2073--Excel Academy Charter School - Helendale
8/19/2025	7/30/2025	1GDM-RX3D-LYMF	1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006796	657.52	249.86		912--Administration/Office	2073--Excel Academy Charter School - Helendale
			1925--Amazon Capital Services, Inc.	4310--Materials & Supplies	EFT	20136006796	657.52	407.66		912--Administration/Office	2053--Excel Academy Charter School - Warner
8/19/2025	8/8/2025	5359-080825	5359--Pitney Bowes	5930--Postage	EFT	20136006798	454.72	281.93		912--Administration/Office	2053--Excel Academy Charter School - Warner
			5359--Pitney Bowes	5930--Postage	EFT	20136006798	454.72	172.79		912--Administration/Office	2073--Excel Academy Charter School - Helendale
8/19/2025	7/14/2025	B3042	3167--Waseca Biomes	4100--Textbooks & Core Curricu	EFT	20136006795	210.00	210.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/19/2025	7/16/2025	1212696	1148--Institute for Excellence in Writing	4100--Textbooks & Core Curricu	EFT	20136006790	144.67	100.48		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/16/2025	1212638	1148--Institute for Excellence in Writing	4100--Textbooks & Core Curricu	EFT	20136006790	144.67	44.19		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/28/2025	8/26/2025	5367-082625	5367--San Bernardino Superintendent Of Schools	9525--STRS	Printed Check	30135	106,600.30	106,600.30		000--Schoolwide -Revenues/BS Accounts	2073--Excel Academy Charter School - Helendale
8/29/2025	7/14/2025	384278	1206--Real Science 4 Kids(Gravitas Publications In	4100--Textbooks & Core Curricu	EFT	104880	223.94	223.94		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/29/2025	7/16/2025	6282324	6420--California History Teachers	4100--Textbooks & Core Curricu	EFT	104865	200.00	200.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/29/2025	7/22/2025	63562	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	EFT	104879	148.48	56.58		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/16/2025	63455	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	EFT	104879	148.48	45.95		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/14/2025	63376	1211--Teaching Textbooks	4100--Textbooks & Core Curricu	EFT	104879	148.48	45.95		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/29/2025	7/17/2025	2612016107	1322--Brave Writer, LLC	4100--Textbooks & Core Curricu	EFT	104857	129.00	129.00		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
8/29/2025	7/29/2025	10726	2699--Nicole the Math Lady, LLC.	4100--Textbooks & Core Curricu	EFT	104863	129.00	129.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/29/2025	8/4/2025	284-266577-7	1376--EMH Sports USA, Inc.	5100--SpEd Consultants and Ven	EFT	104877	105.00	105.00	ESY APE Services July 25	907--Special Education	2073--Excel Academy Charter School - Helendale
8/29/2025	7/25/2025	3000984A	6632--Super Duper Publications	4350--Other Supplies - Materia	EFT	104884	96.98	36.85		907--Special Education	2073--Excel Academy Charter School - Helendale
			6632--Super Duper Publications	4350--Other Supplies - Materia	EFT	104884	96.98	60.13		907--Special Education	2053--Excel Academy Charter School - Warner
8/29/2025	7/16/2025	INVISI1148	1350--DriversEd.Com	4100--Textbooks & Core Curricu	EFT	104882	74.34	74.34		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
8/29/2025	7/21/2025	132025	1303--Royal Fireworks Press	4100--Textbooks & Core Curricu	EFT	104859	43.00	43.00		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/29/2025	7/17/2025	INV232958	5298--Learning Without Tears	4100--Textbooks & Core Curricu	EFT	104855	40.92	22.11		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/16/2025	INV232800	5298--Learning Without Tears	4100--Textbooks & Core Curricu	EFT	104855	40.92	18.81		910--Instructional Funds	2053--Excel Academy Charter School - Warner
8/29/2025	8/7/2025	5460-090125	5460--Hanover Insurance Group	5400--Insurance	EFT	104872	15.00	5.70		901--Human Resources	2073--Excel Academy Charter School - Helendale
			5460--Hanover Insurance Group	5400--Insurance	EFT	104872	15.00	9.30		901--Human Resources	2053--Excel Academy Charter School - Warner
8/29/2025	6/16/2025	4969	6767--1st Day School Supplies LLC	4310--Materials & Supplies	EFT	104888	29,605.06	11,249.92		918--Virtual Education	2073--Excel Academy Charter School - Helendale
			6767--1st Day School Supplies LLC	4310--Materials & Supplies	EFT	104888	29,605.06	18,355.14		918--Virtual Education	2053--Excel Academy Charter School - Warner
8/29/2025	7/15/2025	9203	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	253.90		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/20/2025	9223	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	219.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/21/2025	9236	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	460.80		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/20/2025	9219	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	164.94		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/21/2025	9232	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	431.70		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9176	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	426.80		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	9174	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	413.85		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/20/2025	9214	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	494.85		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/21/2025	9229	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	164.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9178	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	39.90		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/20/2025	9221	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	125.80		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9192	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	263.90		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	9198	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	199.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/22/2025	9240	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	544.75		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/22/2025	9239	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	47.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9175	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	118.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/22/2025	9244	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	425.85		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	9200	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	239.90		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	9181	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	123.80		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9201	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	203.65		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	9213	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	490.85		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/20/2025	9224	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	231.85		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9179	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	682.70		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9196	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	39.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9169	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	263.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9191	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	243.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9199	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	219.90		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/22/2025	9270	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	328.90		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	9211	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	325.80		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/21/2025	9234	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	334.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9206	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	475.85		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/20/2025	9227	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	71.85		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9212	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	251.85		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/21/2025	9230	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	107.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/21/2025	9237	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	186.75		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/15/2025	9209	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	364.85		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/21/2025	9235	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	83.85		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/22/2025	9256	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	144.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/21/2025	9231	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	169.90		910--Instructional Funds	2053--Excel Academy Charter School - Warner
	7/20/2025	9225	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	328.90		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	9193	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	263.90		910--Instructional Funds	2073--Excel Academy Charter School - Helendale
	7/15/2025	9208	1260--McRuffy Press LLC	4100--Textbooks & Core Curricu	EFT	104887	13,945.40	239.90		9	





8/29/2025	7/15/2025 7/17/2025 7/16/2025 7/16/2025 7/15/2025	IN-7564 IN-7591 IN-7568 IN-7567 IN-7560	1339--Elemental Science (Elemental Science, Inc. 1339--Elemental Science (Elemental Science, Inc. 1339--Elemental Science (Elemental Science, Inc. 1339--Elemental Science (Elemental Science, Inc. 1339--Elemental Science (Elemental Science, Inc.	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT EFT EFT EFT	104875 104875 104875 104875 104875	633.94 633.94 633.94 633.94 633.94	127.99 162.99 52.99 139.98 149.99	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale 2073--Excel Academy Charter School - Helendale	
8/29/2025	8/1/2025	14728	5017--Alpha Vision, Inc. 5017--Alpha Vision, Inc.	5940--Technology Services 5940--Technology Services	EFT EFT	104858 104858	379.00 379.00	144.02 234.98	915--Technology 915--Technology	2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
8/29/2025	7/28/2025 8/1/2025	KH3012355 KH3012621	6136--Klett World Languages, Inc. 6136--Klett World Languages, Inc.	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	104856 104856	319.89 319.89	154.19 165.70	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale	
8/29/2025	7/21/2025 7/14/2025	C241785 C241658	2538--Memoria Press 2538--Memoria Press	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT	104876 104876	264.62 264.62	38.75 225.87	910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner	
8/29/2025	7/22/2025 7/22/2025 7/28/2025 7/22/2025 7/22/2025 7/22/2025	7029102311 7029102312 7029112200 7029102315 7029102313 7029102316	1196--Savvas Learning Company LLC 1196--Savvas Learning Company LLC 1196--Savvas Learning Company LLC 1196--Savvas Learning Company LLC 1196--Savvas Learning Company LLC 1196--Savvas Learning Company LLC	4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu 4100--Textbooks & Core Curricu	EFT EFT EFT EFT EFT EFT	104861 104861 104861 104861 104861 104861	241.58 241.58 241.58 241.58 241.58 241.58	24.08 45.87 58.73 32.08 58.73 22.09	910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds 910--Instructional Funds	2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale 2053--Excel Academy Charter School - Warner	
8/29/2025	8/29/2025	5229-090125 Rent	5229--Irvine Spectrum Portfolio LLC 5229--Irvine Spectrum Portfolio LLC	5610--Facility Rents & Leases 5610--Facility Rents & Leases	EFT EFT		5,876.20 5,876.20	3,643.24 2,232.96	09.01.25-09.30.25 Rent 09.01.25-09.30.25 Rent	912--Administration/Office 912--Administration/Office	2053--Excel Academy Charter School - Warner 2073--Excel Academy Charter School - Helendale
<b>Total for CHASE 9313</b>							<b>579,895.71</b>	<b>579,895.71</b>			



**Cash Requirements Statement****EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: 14497BF8F

Period Ending: 05/31/2025

Check Date: 06/10/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 06/09/2025

*A wire request for \$31,912.21 will be sent to your bank on 06/06/2025***Items**

Checks / Vouchers	17
Additional Direct Deposit Accounts	3

**Billing**

Check Processing/Tax Service	615.68
Direct Deposit	7.75
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
<b>Total Billing</b>	<u>653.43</u>

**Tax Deposits**

	<u>Employee Deductions</u>	<u>Employer Liability</u>	<u>Total Deposit</u>
FICA/Social Security	1,416.22	1,416.22	2,832.44
Medicare	443.13	443.13	886.26
Federal W/H Tax	1,688.71		1,688.71
California W/H Next Day	810.29		810.29
California SDI Next Day	374.49		374.49
California ETT Qtrly		1.20	1.20
California SUTA		31.53	31.53
<b>Total Tax Deposits</b>	<u>4,732.84</u>	<u>1,892.08</u>	<u>6,624.92</u>

**Paycom Cash Requirements**

Net Direct Deposits - Paycom Pay	22,968.43
Direct Deposit Distribution - Paycom Pay	1,665.43
Taxes - PAYCOM Resp.	6,624.92
Payroll Fee	653.43
<b>Total Paycom Cash Requirements</b>	<u>31,912.21</u>

**Total Cash Requirements**31,912.21

**Cash Requirements Statement****EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: 56A9A766B

Period Ending: 06/15/2025

Check Date: 06/26/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 06/25/2025

*A wire request for \$35,392.10 will be sent to your bank on 06/24/2025***Items**

Checks / Vouchers	15
Additional Direct Deposit Accounts	3

**Billing**

Check Processing/Tax Service	585.69
Direct Deposit	7.75
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
Additional Services	8,857.00
<b>Total Billing</b>	<b>9,480.44</b>

**Tax Deposits**

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,253.29	1,253.29	2,506.58
Medicare	362.17	362.17	724.34
Federal W/H Tax	1,276.96		1,276.96
California W/H Next Day	643.97		643.97
California SDI Next Day	306.15		306.15
California ETT Qtrly		0.09	0.09
California SUTA		2.38	2.38
<b>Total Tax Deposits</b>	<b>3,842.54</b>	<b>1,617.93</b>	<b>5,460.47</b>

**Paycom Cash Requirements**

Net Direct Deposits - Paycom Pay	17,937.08
Direct Deposit Distribution - Paycom Pay	2,514.11
Taxes - PAYCOM Resp.	5,460.47
Payroll Fee	9,480.44
<b>Total Paycom Cash Requirements</b>	<b>35,392.10</b>

**Total Cash Requirements****35,392.10**

# Cash Requirements Statement

## EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 727B40DFE

Period Ending: 06/30/2025

Check Date: 06/26/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 06/25/2025

*A wire request for \$887,660.70 will be sent to your bank on 06/24/2025*

### Items

Checks / Vouchers	116
Additional Direct Deposit Accounts	13

### Billing

Check Processing/Tax Service	2,100.52
Direct Deposit	10.25
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
<b>Total Billing</b>	<b>2,140.77</b>

### Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	5,750.49	5,750.49	11,500.98
Medicare	14,009.06	14,009.06	28,018.12
Federal W/H Tax	80,289.39		80,289.39
California W/H Next Day	38,895.46		38,895.46
California SDI Next Day	11,362.96		11,362.96
Hawaii W/H Semiweekly	839.85		839.85
Oregon W/C Tax EE	1.58		1.58
Oregon W/C Tax ER		1.58	1.58
Oregon W/H Next Day	489.72		489.72
Oregon EE PFML	40.06		40.06
Oregon SUTA		320.45	320.45
Oregon Transit Tax	6.68		6.68
Oregon ER PFML		26.70	26.70
<b>Total Tax Deposits</b>	<b>151,685.25</b>	<b>20,108.28</b>	<b>171,793.53</b>

### Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	688,645.47
Direct Deposit Distribution - Paycom Pay	25,080.93
Taxes - PAYCOM Resp.	171,793.53
Payroll Fee	2,140.77
<b>Total Paycom Cash Requirements</b>	<b>887,660.70</b>

# Cash Requirements Statement

## EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 727B40DFE

Period Ending: 06/30/2025

Check Date: 06/26/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 06/25/2025

*A wire request for \$887,660.70 will be sent to your bank on 06/24/2025*

**Total Cash Requirements**

887,660.70



# Cash Requirements Statement

## EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 352E9FB8A

Period Ending: 06/30/2025

Check Date: 07/10/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 07/09/2025

*A wire request for \$23,478.68 will be sent to your bank on 07/08/2025*

### Items

Checks / Vouchers	8
Additional Direct Deposit Accounts	1

### Billing

Check Processing/Tax Service	480.65
Direct Deposit	7.25
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
Additional Services	1,950.00
<b>Total Billing</b>	<b>2,467.90</b>

### Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,177.44	1,177.44	2,354.88
Medicare	285.64	285.64	571.28
Federal W/H Tax	1,121.72		1,121.72
California W/H Next Day	535.36		535.36
California SDI Next Day	241.83		241.83
<b>Total Tax Deposits</b>	<b>3,361.99</b>	<b>1,463.08</b>	<b>4,825.07</b>

### Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	14,597.89
Direct Deposit Distribution - Paycom Pay	1,587.82
Taxes - PAYCOM Resp.	4,825.07
Payroll Fee	2,467.90
<b>Total Paycom Cash Requirements</b>	<b>23,478.68</b>

### Total Cash Requirements

**23,478.68**

**Cash Requirements Statement****EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: BA711E0EE

Period Ending: 07/15/2025

Check Date: 07/25/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 07/24/2025

*A wire request for \$20,544.31 will be sent to your bank on 07/23/2025***Items**

Checks / Vouchers	7
Additional Direct Deposit Accounts	1

**Billing**

Check Processing/Tax Service	465.65
Direct Deposit	7.25
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
<b>Total Billing</b>	<u>502.90</u>

**Tax Deposits**

	<u>Employee Deductions</u>	<u>Employer Liability</u>	<u>Total Deposit</u>
FICA/Social Security	1,176.32	1,176.32	2,352.64
Medicare	275.10	275.10	550.20
Federal W/H Tax	996.75		996.75
California W/H Next Day	447.01		447.01
California SDI Next Day	235.08		235.08
<b>Total Tax Deposits</b>	<u>3,130.26</u>	<u>1,451.42</u>	<u>4,581.68</u>

**Paycom Cash Requirements**

Net Direct Deposits - Paycom Pay	13,704.04
Direct Deposit Distribution - Paycom Pay	1,755.69
Taxes - PAYCOM Resp.	4,581.68
Payroll Fee	502.90
<b>Total Paycom Cash Requirements</b>	<u>20,544.31</u>

**Total Cash Requirements**20,544.31

### Cash Requirements Statement

## EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: D495B86AE

Period Ending: 07/31/2025

Check Date: 07/25/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 07/24/2025

*A wire request for \$320,585.01 will be sent to your bank on 07/23/2025*

### Items

Checks / Vouchers	54
Additional Direct Deposit Accounts	9

### Billing

Check Processing/Tax Service	1,172.51
Direct Deposit	9.25
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	10.00
<b>Total Billing</b>	<u>1,221.76</u>

### Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	6,246.22	6,246.22	12,492.44
Medicare	5,032.21	5,032.21	10,064.42
Federal W/H Tax	27,747.37		27,747.37
California W/H Next Day	14,649.37		14,649.37
California SDI Next Day	3,941.28		3,941.28
Hawaii W/H Semiweekly	776.84		776.84
Oregon W/C Tax EE	1.66		1.66
Oregon W/C Tax ER		1.66	1.66
Oregon W/H Next Day	519.81		519.81
Oregon EE PFML	42.40		42.40
Oregon SUTA		339.19	339.19
Oregon Transit Tax	7.07		7.07
Oregon ER PFML		28.27	28.27
<b>Total Tax Deposits</b>	<u>58,964.23</u>	<u>11,647.55</u>	<u>70,611.78</u>

### Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	235,375.63
Direct Deposit Distribution - Paycom Pay	13,270.84
Taxes - PAYCOM Resp.	70,611.78
Payroll Fee	1,221.76
Garnishment Checks - Paycom Pay	105.00

**Cash Requirements Statement****EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: D495B86AE

Period Ending: 07/31/2025

Check Date: 07/25/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 07/24/2025

*A wire request for \$320,585.01 will be sent to your bank on 07/23/2025*

<b>Total Paycom Cash Requirements</b>	<b>320,585.01</b>
<b>Other Cash Requirements</b>	
Manual Checks	3,151.22
<b>Total Other Cash Requirements</b>	<b>3,151.22</b>
<b>Total Cash Requirements</b>	<b>323,736.23</b>





# Cash Requirements Statement

## EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 46E919B0C

Period Ending: 07/31/2025

Check Date: 08/08/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/07/2025

*A wire request for \$25,066.75 will be sent to your bank on 08/06/2025*

### Items

Checks / Vouchers	8
Additional Direct Deposit Accounts	1

### Billing

Check Processing/Tax Service	480.65
Direct Deposit	7.25
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
Additional Services	11.85
<b>Total Billing</b>	<b>529.75</b>

### Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,334.24	1,334.24	2,668.48
Medicare	336.29	336.29	672.58
Federal W/H Tax	1,397.87		1,397.87
California W/H Next Day	701.31		701.31
California SDI Next Day	286.56		286.56
<b>Total Tax Deposits</b>	<b>4,056.27</b>	<b>1,670.53</b>	<b>5,726.80</b>

### Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	16,909.33
Direct Deposit Distribution - Paycom Pay	1,900.87
Taxes - PAYCOM Resp.	5,726.80
Payroll Fee	529.75
<b>Total Paycom Cash Requirements</b>	<b>25,066.75</b>

### Total Cash Requirements

**25,066.75**

# Cash Requirements Statement

## EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 10F93665C

Period Ending: 08/15/2025

Check Date: 08/26/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/25/2025

*A wire request for \$28,211.87 will be sent to your bank on 08/22/2025*

### Items

Checks / Vouchers	11
Additional Direct Deposit Accounts	1

### Billing

Check Processing/Tax Service	525.63
Direct Deposit	7.25
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	No Charge
Additional Services	1,338.00
<b>Total Billing</b>	<b>1,900.88</b>

### Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	1,294.96	1,294.96	2,589.92
Medicare	368.79	368.79	737.58
Federal W/H Tax	1,343.39		1,343.39
California W/H Next Day	682.28		682.28
California SDI Next Day	313.25		313.25
<b>Total Tax Deposits</b>	<b>4,002.67</b>	<b>1,663.75</b>	<b>5,666.42</b>

### Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	18,886.66
Direct Deposit Distribution - Paycom Pay	1,757.91
Taxes - PAYCOM Resp.	5,666.42
Payroll Fee	1,900.88
<b>Total Paycom Cash Requirements</b>	<b>28,211.87</b>

### Total Cash Requirements

**28,211.87**

### Cash Requirements Statement

## EXCEL ACADEMY CHARTER SCHOOLS

Transaction #: 3E06C6470

Period Ending: 08/31/2025

Check Date: 08/26/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/25/2025

*A wire request for \$969,949.42 will be sent to your bank on 08/22/2025*

### Items

Checks / Vouchers	135
Additional Direct Deposit Accounts	18

### Billing

Check Processing/Tax Service	2,391.00
Direct Deposit	11.50
Jurisdiction Filing	30.00
Garnishment Fee this Payroll	30.00
<b>Total Billing</b>	<b>2,462.50</b>

### Tax Deposits

	Employee Deductions	Employer Liability	Total Deposit
FICA/Social Security	6,382.86	6,382.86	12,765.72
Medicare	15,373.67	15,373.67	30,747.34
Federal W/H Tax	84,042.77		84,042.77
California W/H Next Day	42,487.55		42,487.55
California SDI Next Day	12,481.95		12,481.95
California ETT Qtrly		119.75	119.75
California SUTA		3,113.39	3,113.39
Hawaii W/H Semiweekly	755.77		755.77
Oregon W/C Tax EE	1.74		1.74
Oregon W/C Tax ER		1.74	1.74
Oregon W/H Next Day	663.29		663.29
Oregon EE PFML	52.92		52.92
Oregon SUTA		344.55	344.55
Oregon Transit Tax	8.82		8.82
Oregon ER PFML		35.28	35.28
<b>Total Tax Deposits</b>	<b>162,251.34</b>	<b>25,371.24</b>	<b>187,622.58</b>

### Paycom Cash Requirements

Net Direct Deposits - Paycom Pay	748,154.52
Direct Deposit Distribution - Paycom Pay	30,590.87
Taxes - PAYCOM Resp.	187,622.58

**Cash Requirements Statement****EXCEL ACADEMY CHARTER SCHOOLS**

Transaction #: 3E06C6470

Period Ending: 08/31/2025

Check Date: 08/26/2025

Client: 10056

EIN: 47-4121751

PAYCOM Impound Date: 08/25/2025

*A wire request for \$969,949.42 will be sent to your bank on 08/22/2025*

Payroll Fee	2,462.50
Garnishment Checks - Paycom Pay	1,118.95
<b>Total Paycom Cash Requirements</b>	<b>969,949.42</b>
<b>Other Cash Requirements</b>	
Manual Checks	1,608.11
<b>Total Other Cash Requirements</b>	<b>1,608.11</b>
<b>Total Cash Requirements</b>	<b>971,557.53</b>



# Coversheet

## Consent - Education Student/Services

**Section:** VII. Consent  
**Item:** B. Consent - Education Student/Services  
**Purpose:**  
**Submitted by:**  
**Related Material:** Pali FT Form - 25\_26.pdf  
ELD Handbook for Families-2025-26.pdf  
EACS 2025-26 ELD Handbook Revisions.pdf  
UPK Criterion 2 Board Proposal - Addendum (1).pdf  
SPED Vendors 25-26 - 25\_26 NPA List.pdf  
2025-26 ISA.pdf  
25-26 MASTER CONTRACT.docx.pdf  
EACS 2025-26 Handbook Revisions - Sept.pdf  
EACS Handbook-25\_26 (Sept).pdf

### BACKGROUND:

Item: Pali Institute Science Camp

Background: It is recommended that the Board approve the Pali Institute Overnight Science Camp Field Trips on November 7-9, 2025, which is scheduled for students in 5th-8th grade as well as 9th-12th grade.

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

Item: UPK Criterion 2 Proposal Addendum

Background: Due to the uniqueness of our model and the necessity that all elementary ToRs have the updated TK certification, it has been difficult to find qualified teachers who have met our LEA-specific UPK requirements prior to hiring. This updated proposal requires ToRs to follow our policy and obtain the needed units, but affords EACS the ability to place TK students with ToRs who live in the same geographical region and to distribute them appropriately among all elementary teachers and new hires. Requiring all teachers to meet the 12 unit requirement *prior* to servicing TK students is no longer sustainable with our current level of growth and the expansion of the TK program in general. The proposed addendum provides a workable solution which would allow EACS to support families well while continuing to hold teachers accountable to meet the updated requirements within a reasonable timeframe.

Item: EACS English Language Development (ELD) Handbook

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

Item: 2025-2026 Special Education Contracted Vendors List

Background: Excel Academy Charter Schools Special Education partners with a list of researched and curated vendors to provide services to students that cannot be accommodated by Excel Academy Staff. Services include Physical Therapy, Adapted Physical Education, Speech Language Pathology, Auditory services, and counseling.

## Education Services

### OVERNIGHT FIELD TRIP REQUEST FORM for BOARD APPROVAL

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

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

Date of Request	<b>9/11/2025</b>
Name of Charter School	<b>Excel Academy Charter Schools</b>
Lead Chaperone	<b>Melissa Harvilla</b>
Field Trip Coordinator	<b>Melissa Harvilla</b>
Director/Executive Director/Designee  Location of Trip	<a href="#"><u>Pali Institute: Outdoor Education Center</u></a>
Dates of Trip  Classes/Grade Level(s)	<b>November 7-9, 2025</b>
Instructional Objectives	<ol style="list-style-type: none"> <li>1. Students will analyze and interpret data they have collected from an owl pellet dissection and determine food source and other environmental factors from evidence.</li> <li>2. Students will explore the mechanics of the layers of the earth and conduct an investigation to determine the percentage of iron on the surface of the earth.</li> </ol>

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 11, 2025 at 9:40 AM	<ol style="list-style-type: none"> <li>3. Students will demonstrate knowledge of design solutions, business marketing, and product testing through a “balloon drop” workshop.</li> <li>4. Students will learn basic outdoor skills and work as a team to problem solve during an outdoor survival simulation.</li> <li>5. Students will draw inspiration from nature and create their own works of art based on the natural world around them.</li> </ol>
Standards Addressed	<p>NGSS MS-ETS1-3. Analyze data from tests to determine similarities and differences among several design solutions to identify the best characteristics of each that can be combined into a new solution to better meet the criteria for success.</p> <p>3-5ETS1-1. Define a simple design problem reflecting a need or want that includes specific criteria for success and constraints on materials, time, or cost.</p> <p>3-5ETS1-2. Generate and compare multiple possible solutions to a problem based on how well each is likely to meet the criteria and constraints on the problem.</p> <p>CCSS ELA-Literacy.RST-608.3. Follow precisely a multistep procedure when carrying out experiments, taking measurements, or performing technical tasks.</p> <p>NGSS 3-5ETS1-3. Plan and carry out fair tests in which variables are controlled and failure points are considered to identify aspects of a model or prototype that can be improved.</p> <p>NGSS 5-PS2-1. Support an argument that the gravitational force exerted by Earth on objects is directed down.</p> <p>NGSS MS-PS2-2. Plan an investigation to provide evidence that the change in an object’s motion depends on the sum of the forces on the object and the mass of the object.</p> <p>NGSS MS-PS2-4. Construct and present arguments using evidence to support the claim that gravitational interactions are attractive and depend on the masses of interacting objects.</p>

Additional Information (if applicable)	<p>Friday 11am check in 3 sessions</p> <p>Saturday 5 sessions</p> <p>Sunday 1 session 11am departure</p>
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Fees and payment Schedule	<b>\$435 per student</b> <b>Payment due in full by 9/23/25</b>
Transportation  Phone Tree/Chaperone Groups  Signatures  Lead Chaperone Date: 9/4/25  Field Trip Coordinator Date: 9/4/25	

## Education Services

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### OVERNIGHT FIELD TRIP REQUEST FORM for BOARD APPROVAL

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

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

Date of Request	<b>9/11/2025</b>
Name of Charter School	<b>Excel Academy Charter Schools</b>
Lead Chaperone	<b>Melissa Harvilla</b>
Field Trip Coordinator	<b>Melissa Harvilla</b>
Director/Executive Director/Designee  Location of Trip	<a href="#"><u>Pali Institute: Outdoor Education Center</u></a>
Dates of Trip  Classes/Grade Level(s)	<b>November 7-9, 2025</b>
Instructional Objectives	<ol style="list-style-type: none"> <li>1. Students will study the night sky and learn about navigating by stars, tour the seasonal constellations, and learn about our expansive universe.</li> <li>2. While hiking, students will explore and learn about the ecosystems around them. They will identify plants, study animals, and observe visible examples of symbiotic relationships, genetic adaptations, and</li> </ol>

Excel Academy (CA) - Regular Meeting of the Board of Directors - Agenda - Thursday September 11, 2025 at 9:40 AM	<p>ecological succession.</p> <p>3. Students will learn basic outdoor skills and work as a team to problem solve during an outdoor survival simulation.</p> <p>4. Students will draw inspiration from nature and create their own works of art based on the natural world around them.</p>
Standards Addressed	<p>ESS2.A: Earth Materials and Systems Earth's systems, being dynamic and interacting, cause feedback effects that can increase or decrease the original changes.</p> <p>ESS2.E: Biogeology The many dynamic and delicate feedbacks between the biosphere and other Earth systems cause a continual co-evolution of Earth's surface and the life that exists on it.</p> <p>Prof.VA:Cr1.1: Creativity and innovative thinking are essential life skills that can be developed.</p>

Additional Information (if applicable)	<p>Friday 11am check in 3 sessions</p> <p>Saturday 5 sessions</p> <p>Sunday 1 session 11am departure</p>
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Fees and payment Schedule	<p><b>\$435 per student</b> <b>Payment due in full by 9/23/25</b></p>
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Transportation

Phone Tree/Chaperone  
Groups

Signatures

Lead Chaperone Date: 9/4/25

Field Trip Coordinator Date: 9/4/25



# ELD Handbook for Families

## What is EL?

English Learner

## What is ELD?

English Language Developer / English Language Development

## Who Can I Contact?

General Questions and Support	Your Teacher of Record
Curriculum & Instruction	Student's assigned ELD Teacher
Assessment and Program Development Coordinator - Contact for ELD Curriculum and Live Courses, ELPAC Assessments, Parent Communication	Erica Flores eflores@excelacademy.education
Director of Operations and Accountability -	Jenny Craig jcraig@excelacademy.education

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Contact for - Student Language Fluency Designation and EL Master Plan	
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## Identification

Every family completes a Home Language Survey (HLS) as part of their enrollment process. If a family answers yes to any of the questions, schools are required to administer the initial ELPAC assessment.

## Designation

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

## State Requirements

[California Department of Education Recommendation](#)

## English Language Development (ELD)

- Synchronous, *designated* instruction through virtual classes for acquisition of linguistic and academic goals in the domains of



listening, speaking, reading and writing per the California Department of Education.

- Asynchronous assignments using a research-based curriculum proven to meet the needs of English learners.

## Requirements

EL students are required to participate in *designated*, synchronous, virtual instruction through our ELD classes including asynchronous assignments to meet the ELD requirement each week. Absences must be reported to the Assessment and Program Development Coordinator. .

We are generally unable to accept private tutoring or time at a learning center in place of our ELD instruction because we are unable to monitor attendance, participation, and student progress. Private tutoring or a learning center is certainly recommended as a supplement to ELD class instruction.

## Family Support

- Work together to reclassify your student(s) as English proficient.
- Remain consistent with ELD attendance so your students get the most out of their learning experience
- Communicate with the ELD Class Teacher, Teacher of Record (ToR) or Virtual Teacher, and Assessment and Program Development Coordinator for collaborative support.

## Progress Improvement Notification

A Progress Improvement Notification (PIN) for the ELD instruction may be issued for any of the following:

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- Unexcused absences from ELD Class
- Incomplete/missing assignments from ELD Class
- Excessive absences from ELD Class

## Exiting EL Designation

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

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

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

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

## Long Term English Learner (LTEL)

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





- Students in grades 6 to 12
- Enrolled in U.S. schools for more than six years
- Remained at the same level of English for two or more years as measured by ELPAC
- Scored "standard not met" or "standard nearly met" on the CAASPP ELA assessment.

Families will be notified annually if their student has been classified as an LTEL. If, despite the implementation of school-wide interventions and supports, a student is still not making "adequate progress", the school will hold a Student Success Team (SST) meeting to discuss the lack of progress. Intervention will be planned by the SST team to support students not meeting interim benchmarks. Interventions will be documented through the Assessment Department. SST goals will be implemented with ToR support and monitoring.

## ELs with an IEP

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

## Curriculum & Instruction

Your ELD teacher will support you with access to the resources needed for ELD curriculum and instruction.

- Virtual instruction and parent communication is led by the ELD teacher and the Assessment Dept. The ToR will follow up to provide support as needed.

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- Students receive 90-105 minutes of instruction each week (class days and times vary depending on grade level) [ELD Class Schedule](#)
- All student absences and travel plans must be reported to the student's ELD Teacher.
- Assignments will be given by the ELD teacher.
- The ELD teacher will monitor and communicate student participation and progress.

## EL Teaching Strategies

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

SDAIE is instruction in a subject area, classified in English, that is specially designed to meet the needs of limited-English-proficient pupils. Academic instruction through English is modified to meet the student's level of language proficiency. ToRs and Parents should use specialized strategies that enable students to understand, participate in, and access the core curriculum. SDAIE is an instructional methodology, not a program.

(EC 44253.2[b])

### SDAIE Strategies:

- Speak slowly and use repetition
- Lots of visuals and realia
- Manipulatives available
- Activate prior knowledge
- Focus on the meaning
- Graphic organizer/Charts
- Preview-Review
- Gestures and facial expressions
- Self-selected reading
- Scaffolding (visual content, graphic organizers)

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- Consistent and Immediate Feedback
- Summarizing and Re-Teaching
- Reciprocal Teaching

## ELD Standards

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

### [EACS EL Master Plan](#)

The ultimate goal of Excel Academy Charter School English Learner instruction 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 support, 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 instruction
- Valuing bi-literacy as a skill that will assist the student in life

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## Translation & Interpretation

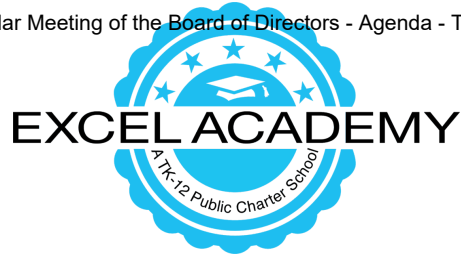
Please let your Teacher of Record know if you wish to have communication sent in your primary language or would like to request an interpreter for virtual/in-person meetings.

[DeepL](#) is recommended for accurate translation.

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

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

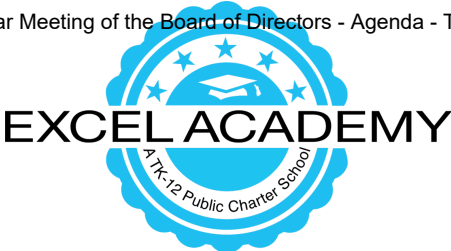
Join the English Learner Advisory Committee (ELAC). This is a committee for parents or other community members who want to advocate for English Learners. School Information and opportunities for English Learner support and participation are shared during the meeting. Information to join these meetings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



**EACS SEPTEMBER 2025 - ELD HANDBOOK REVISIONS**

Recommended for board approval to align with new provisions and update language for clarity

<i>Section</i>	<i>Item</i>
<b>Overall</b>	<ul style="list-style-type: none"> <li>● Revision of wording for more clarity and grammatical accuracy.</li> <li>● Updated main point of contact information</li> </ul>
<b><u>Section:</u></b> <b>Contacts</b>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> <li>● Updated the main point of contact for ELD Curriculum, Courses, ELPAC Assessments, and Parent Communication</li> </ul>
<b><u>Section:</u></b> <b>Requirements</b>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> <li>● Changed the reporting staff member for absences to the Assessment &amp; Program Development Coordinator from the Intervention department.</li> </ul>
<b><u>Section:</u></b> <b>ELs with an IEP</b>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> <li>● Changed the collaborating department for Sped Students who are EL from the Intervention Department to the Assessment Department.</li> </ul>
<b><u>Section:</u></b> <b>Curriculum &amp; Instruction</b>	<p><i>Revised:</i></p> <ul style="list-style-type: none"> <li>● Changed the main support of EL students from the Teacher of Record to the ELD Teacher.</li> <li>● Removed Intervention department and replaced with Assessment department for the main support of Virtual Instruction and parent communication.</li> <li>● Specified instructional minutes</li> </ul>



<p><b><u>Section:</u></b> <b>ELD Standards</b></p>	<p><i>Revised:</i></p> <ul style="list-style-type: none"><li>• Updated the EACS EL Master Plan link</li></ul>
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## Universal Pre-Kindergarten Criterion Proposal

### CDE Requirements for servicing TK students in 2023 and beyond:

- As a condition of apportionment, existing law requires a credentialed teacher who is first assigned to a TK classroom after July 1, 2015, to have one of the following by August 1, 2023:
  - At least 24 units in early childhood education, childhood development, **or both**;
  - As determined by the LEA employing the teacher, professional experience in a classroom setting with preschool age children that is comparable to the 24 units of education described above; **or**
  - A child development teacher permit issued by the Commission on Teacher Credentialing.
    - **Permit options:** Child Development Teacher Permit, Child Development Master Teacher Permit, Child Development Site Supervisor Permit, or the Child Development Program Director Permit

### Proposed Second Addendum - September 11, 2025:

Elementary Teachers of Record are eligible to support TK students on their roster with a signed commitment to complete 12 units of approved Early Childhood Education by the end of their first employee agreement at EACS.

### Proposal Addendum Approved - October 4, 2024:

Teachers of Record with a multiple subject teaching credential who have not previously worked with TK students at Excel Academy, but who have successfully completed 12 units of approved Early Childhood Education, will be eligible to support TK students on their roster. To complete their certification



process, they will be paired with an Early Childhood Education Instructional Coach for one year and participate in ongoing internal professional development.

### **Proposal Approved - January 12, 2023**

Teachers of Record who have taught a minimum of 2 years of preschool or transitional kindergarten in a classroom setting will be eligible to support TK students on their rosters based on their prior experience, with a commitment to ongoing professional development.

Teachers of Record who have worked with TK students for a minimum of 2 years at Excel Academy and have acquired 9 units of relevant Child Development coursework by August 1, 2023 (and 12 units by December 1, 2023) will be eligible to support TK students on their roster, with a commitment to ongoing professional development.

Teachers of Record who have worked with TK students at Excel Academy for a minimum of 2 years and have successfully completed 12 units of approved Early Childhood Education, will be eligible to support TK students on their roster.



Vendor/ Non Public Agency	Contact	Phone	Email	Address	Clinics /Locations	Website
<b>Beyondnd Blindness</b>	Meredith Cagle	714 - 573-8888 Ext. 3013	meredith.cagle@beyondblindness.org	18542- B Vanderlip Ave., Santa Ana, CA 92705	Santa Ana	<a href="https://www.beyondblindness.org/">https://www.beyondblindness.org/</a>
<b>Effectual Educational Consulting Services (EECS)</b>	Mark Hopkins	661-400-1407	<a href="mailto:amfig901@gmail.com">amfig901@gmail.com</a>	23120 Alicia Parkway #226, Mission Viejo, CA 92692	N/A	<a href="https://eecsspedservices.com/">https://eecsspedservices.com/</a>
	Carie Abrew		<a href="mailto:cabrew@eecsspedservices.com">cabrew@eecsspedservices.com</a>			
	Rhawnda Bochum - Operations Manager	714-485-5885	<a href="mailto:rhawnda.bochum@eecsspedsvices.com">rhawnda.bochum@eecsspedsvices.com</a>			
<b>EMH Sports USA, Inc.</b>	Linda Hollis	951-541-0494	<a href="mailto:lindahollis@emhsports.com">lindahollis@emhsports.com</a>	PO Box 892491, Temecula, CA 92589	N/A	<a href="https://www.emhsports.com/">https://www.emhsports.com/</a>
	Karen Wentzel (APE Services)	951-587-7079	<a href="mailto:karenwentzel@emhsports.com">karenwentzel@emhsports.com</a>			
	Paige Shapton- APE Program Director	916-805-3595	<a href="mailto:PaigeShapton@emhsports.com">PaigeShapton@emhsports.com</a>			
	Rachel Jennings- Billing	951-562-2122	<a href="mailto:csrachel@emhsports.com">csrachel@emhsports.com</a>			
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	Amanda Fink - Owner/Director		<a href="mailto:amanda@infinitykids.com">amanda@infinitykids.com</a>	101 South Kraemer Blvd. #136, Pacentia, CA	Placentia	
<b>John Tracy Center</b>	Cecilia Vanin- COO	(213) 863-9946	<a href="mailto:cvanin@jtc.org">cvanin@jtc.org</a>	2160 W Adams Blvd, Los Angeles   CA, 90018 United States	Los Angeles	<a href="https://www.jtc.org/">https://www.jtc.org/</a>
				740 E Wardlow Rd, Long Beach, CA 90807	Long Beach	
				207 South Santa Anita Street Suite 300, San Gabriel, CA 91776	San Gabriel	
<b>Jump and Schout Therapy</b>	Dr. Leann Schouten - CEO	714-529-5022	<a href="mailto:admin@jumpandschouttherapy.com">admin@jumpandschouttherapy.com</a>	500 W. Central Ave., Ste. B, Brea, CA 92821	Brea	<a href="http://www.leannschouten.com/index.html">http://www.leannschouten.com/index.html</a>
	Donna Heller - Billing		<a href="mailto:accounting@jumpandschouttherapy.com">accounting@jumpandschouttherapy.com</a>	14850 Central Ave Chino, CA 91711	Chino Hills	
<b>Kids Connection Developmental Therapy Center</b>	Dr. Cynthia Conway- Clinical Director	805-416-3384	<a href="mailto:info@kidsconnectiontherapy.com">info@kidsconnectiontherapy.com</a>	2665 Park Center Drive, Suite D, Simi Valley, CA 93065	Simi Valley	<a href="https://www.kidsconnectiontherapy.com/">https://www.kidsconnectiontherapy.com/</a>
	Mayra Mackenzie- Chief Operating Officer	805-416-3384 Ext. 1021	<a href="mailto:mayram@kidsconnectiontherapy.com">mayram@kidsconnectiontherapy.com</a>	9518 9th St., Rancho Cucamonga, CA 91786	Rancho Cucamonga	
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	TJ Lorenzana- Director of Operations and Compliance		<a href="mailto:TJ@mykidsinmotion.com">TJ@mykidsinmotion.com</a>			
	Marcie Rhee- Executive Director/Owner					
<b>Little Ears Therapy Center</b>	Leslie Guzman	562-305-0160	<a href="mailto:littleearstherapy@gmail.com">littleearstherapy@gmail.com</a>	16410 E. Whittier Blvd., Whittier, CA 9003	Whittier	<a href="http://www.littleearstherapy.com/">http://www.littleearstherapy.com/</a>
	Liz Saldana - Office Manager	562-902-9490				
<b>Marshall B. Ketchum University</b>	Rita Martinez	714-449-7404	<a href="mailto:martinez@ketchum.edu">martinez@ketchum.edu</a>	5460 E. La Palma Ave   Anaheim, CA 92807	Anaheim	<a href="http://ketchumhealth.org">ketchumhealth.org</a>
<b>Oxford Consulting Services</b>	Christina Russi - Program Director	949-596-9125	<a href="mailto:crussi@oxfordconsulting.com">crussi@oxfordconsulting.com</a>	28202 Cabot Rd., Suite 300, Laguna Niguel, CA 92677	N/A	<a href="https://www.oxfordconsulting.com/">https://www.oxfordconsulting.com/</a>
	Tiffany Gonzalez - Case Coordinator	609-495-6820	<a href="mailto:tgonzalez@oxfordconsulting.com">tgonzalez@oxfordconsulting.com</a>			
	Deborah Domino - Accounting	732-761-1955	<a href="mailto:ddomino@oxfordconsulting.com">ddomino@oxfordconsulting.com</a>			
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	Melissa Matias - Project Coordinator	626-372-9944	<a href="mailto:mmatis@partnersped.com">mmatis@partnersped.com</a>			
	Marta Sharp - Project Coordinator	626-921-8283	<a href="mailto:msharp@partnersped.com">msharp@partnersped.com</a>			
<b>Small Talk OC (Natalie Neal)</b>	Natalie Neal	714-396-8685	<a href="mailto:natalie@smalltalkoc.com">natalie@smalltalkoc.com</a>	20162 SW Birch St, Suite 350, Newport Beach, CA 92660	Newport Beach	<a href="https://www.smalltalkoc.com/">https://www.smalltalkoc.com/</a>
	Tracey Nieto-Rubio- Billing	949-204-0380	<a href="mailto:billing@smalltalkoc.com">billing@smalltalkoc.com</a>			
<b>Specialized Therapy Services</b>	Steve Oas - Director	619-431-5049	<a href="mailto:steve@theoascenter.com">steve@theoascenter.com</a>	4204 Adams Ave., San Diego, CA 92116	San Diego, Irvine	<a href="https://theoascenter.com/">https://theoascenter.com/</a>
	Erin Zumwalt - Operations Manager	Steve Cell: 619-252-4557	<a href="mailto:erin@theoascenter.com">erin@theoascenter.com</a>			
	Tina Poudrier- Service Coordinator	740-762-0889	<a href="mailto:tina.oascenter@gmail.com">tina.oascenter@gmail.com</a>			
<b>Therapy in Action</b>	Emily Dassow - Coordinator of School Based Services	818-708-2292	<a href="mailto:emily@therapyinaction.com">emily@therapyinaction.com</a>	18522 Oxnard St., Tarzana, CA 91356	Tarzana	<a href="https://therapyinaction.com/">https://therapyinaction.com/</a>
	Joanne Peterson - Billing		<a href="mailto:joanne@therapyinaction.com">joanne@therapyinaction.com</a>			

<b>Total Education Solutions/ TES Therapy</b>	Dana Rivera - Contracts Administrator	213-607-4338	<a href="mailto:drivera@tesidea.com">drivera@tesidea.com</a>	99 Pasadena Ave Ste 10C, South Pasadena, CA 91030	San Diego, Downtown LA, Alhambra, Lynwood	<a href="https://tesidea.com/">https://tesidea.com/</a>
	Joseph Macedonio - Accounting	323-622-0744 x 1063	<a href="mailto:jmacedonio@tesidea.com">jmacedonio@tesidea.com</a>	5151 Murphy Canyon Road, Suite 150, San Diego, CA 92123	San Diego	
				1015 Wilshire Blvd., Suite 200 Los Angeles, CA 90017	DTLA	
				1000 S. Fremont Avenue, Building A10N, Suite 10220, Alhambra, CA 91803	Alhambra	
				3737 Martin Luther King Blvd., Suite 604, Lynwood, CA 90262	Lynwood	



### Exhibit B: 2025-26 Individual Service Agreement (ISA)

Nonpublic School/Agency: \_\_\_\_\_

Local Education Agency: \_\_\_\_\_

Case Manager: \_\_\_\_\_

Pupil's Name: \_\_\_\_\_ SSID: \_\_\_\_\_

Sex:  M  F Birthdate: \_\_\_\_\_ Grade: \_\_\_\_\_ Primary Disability: \_\_\_\_\_

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

Pupil's Address: \_\_\_\_\_ Parent Phone & Email: \_\_\_\_\_

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

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

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

C. Individual Pupil Specifications: \_\_\_\_\_

#### Progress Reporting Requirements:

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

Nonpublic Agency:

Local Educational Agency:

\_\_\_\_\_  
(Authorized Signature) (Date)

\_\_\_\_\_  
(Authorized Signature) (Date)

\_\_\_\_\_  
Phone: Fax

\_\_\_\_\_  
Phone: Fax

---

***NONPUBLIC, NONSECTARIAN  
SCHOOL/AGENCY SERVICES  
MASTER CONTRACT  
2025-2026***

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*This version of the Master Contract constitutes an individual agreement between the Local Education Agency (LEA) and the Nonpublic School/Agency (NPS/A). The Sonoma County SELPA and the Sonoma County Charter SELPA are not parties to this agreement and assume no legal responsibility or obligation for the terms, enforcement, or execution of this contract. All responsibilities, liabilities, and obligations arising from the use and implementation of this agreement rest solely with the contracting LEA and NPS/A.*

**MASTER CONTRACT  
GENERAL AGREEMENT FOR NON-SECTARIAN,  
NONPUBLIC SCHOOL AND AGENCY SERVICES**

**LEA:**

Contract Year: 2025 -2026

Nonpublic School:

Nonpublic Agency:

**Type of Contract:**

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

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

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

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

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EXHIBIT A: 2025-2026 RATES

EXHIBIT B: 2025-2026 ISA

**2025 -2026**

**Local Education Agency:**

**NONPUBLIC SCHOOL/AGENCY/RELATED SERVICES PROVIDER:**

**NONPUBLIC, NONSECTARIAN SCHOOL/AGENCY SERVICES**  
**MASTER CONTRACT**

**AUTHORIZATION FOR MASTER CONTRACT AND GENERAL PROVISIONS**

**1. MASTER CONTRACT**

This Master Contract (or “*Contract*”) is entered into on August 1, 2025, between, **Name of Contracting Entity** hereinafter referred to as the local educational agency (“LEA”), a member of the Sonoma County SELPA, and **Name of NPS/A**. (nonpublic, nonsectarian school or agency), hereinafter referred to as NPS/A or “CONTRACTOR” for the purpose of providing special education and/or related services to students with exceptional needs under the authorization of California Education Code sections 56157, 56361 and 56365 et seq. and Title 5 of the California Code of Regulations section 3000 et seq., AB490 (Chapter 862, Statutes of 2003) and AB1858 (Chapter 914, Statutes of 2004). It is understood that this agreement does not commit the LEA to pay for special education and/or related services provided to any student, or CONTRACTOR to provide such special education and/or related services, unless and until an authorized LEA representative approves the provision of special education and/or related services by CONTRACTOR.

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

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

**2. CERTIFICATION AND LICENSES**

CONTRACTOR shall be certified by the California Department of Education (hereinafter referred to as “CDE”) as an NPS/A. All NPS/A services shall be provided consistent with the area of certification and licensure specified by CDE Certification and as defined in California Education Code, section 56366 et seq and within the professional scope of practice of each provider’s license, certification, and/or credential. A current copy of CONTRACTOR’s NPS/A certification or a waiver of such certification issued by the CDE pursuant to



Education Code section 56366.2 must be provided to LEA on or before the date this Agreement is executed by CONTRACTOR. This Master Contract shall be null and void if such certification or waiver is expired, revoked, rescinded, or otherwise nullified during the effective period of this Master Contract. Total student enrollment shall be limited to capacity as stated on CDE certification, and in Section 24 of the Master Contract.

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

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

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

### **3. COMPLIANCE WITH LAWS, STATUTES, REGULATIONS**

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

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

### **4. TERM OF MASTER CONTRACT**

The term of this Master Contract shall be from August 1, 2025 – July 31, 2026 (Title 5 California Code of Regulations section 3062(a)) unless otherwise stated. Neither the CONTRACTOR nor the LEA is required to renew this Master Contract in subsequent contract years. The parties acknowledge that any subsequent Master Contract is to be re-negotiated prior to July 31, 2026. (Title 5 California Code of Regulations section 3062 (d)). In the event the contract negotiations are not agreed to by July 31, 2026, the most recently executed Master Contract will remain in effect for 90 days (Title 5 California Code of Regulations section 3062(d)). No Master

Contract will be offered unless and until all of the contracting requirements have been satisfied. The offer of a Master Contract to a CONTRACTOR is at the sole discretion of the LEA.

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

## **5. INTEGRATION/CONTINUANCE OF CONTRACT FOLLOWING EXPIRATION OR TERMINATION**

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

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

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

## **6. INDIVIDUAL SERVICE AGREEMENT; EXHIBIT B ("ISA")**

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

Any and all changes to a student's educational placement/program provided under this Master Contract and/or an ISA shall be made solely on the basis of a revision to the student's IEP or by written agreement between the parent and LEA. At any time during the term of this Master Contract, a student's parent, CONTRACTOR, or LEA may request a review of a student's IEP subject to all procedural safeguards required by law.

Unless otherwise provided in this Master Contract, the CONTRACTOR shall provide all services specified in the IEP unless the CONTRACTOR and the LEA agree otherwise in the ISA. (California Education Code sections 56366(a) (5) and 3062(e)). In the event the CONTRACTOR is unable to provide a specific service at any time during the life of the ISA, the CONTRACTOR shall notify the LEA in writing within five (5) business days of the last date a service was provided. CONTRACTOR shall provide any and all subsequent

compensatory service hours awarded to a student as a result of lack of provision of services while student was served by NPS/A.

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

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

## **7. DEFINITIONS**

The following definitions shall apply for purposes of this contract:

a. The term “CONTRACTOR” means a nonpublic, nonsectarian school/agency certified by the California Department of Education and its officers, agents, and employees.

b. The term “authorized LEA representative” means a LEA administrator designated to be responsible for NPS/A. It is understood, a representative of the Special Education Local Plan Area (SELPA) of which the LEA is a member is an authorized LEA representative in collaboration with the LEA. The LEA maintains sole responsibility for this Contract, unless otherwise specified in this Contract.

c. The term “credential” means a valid credential, life diploma, permit, or document in special education or pupil personnel services issued by, or under the jurisdiction of, the State Board of Education if issued prior to 1970 or the California Commission on Teacher Credentialing, which entitles the holder thereof to perform services for which certification qualifications are required as defined in Title 5 of the California Code of Regulations section 3001(g).

d. The term “qualified” means that a person holds a certificate, permit or other document equivalent to that which staff in a public school are required to hold to provide special education and related services and has met federal and state certification, licensing, registration, or other comparable requirements which apply to the area in which the individual is providing special education or related services, including those requirements set forth in Title 34 of the Code of Federal Regulations sections 200.56 and 200.58, and those requirements set forth in Title 5 of the California Code of Regulations Sections 3064 and 3065, and adheres to the standards of professional practice established in federal and state law or regulation, including the standards contained in the California Business and Professions Code.

Nothing in this definition shall be construed as restricting the activities in services of a graduate needing direct hours leading to licensure, or of a student teacher or intern leading to a graduate degree at an accredited or approved college or university, as authorized by state laws or regulations. (Title 5 of the California Code of Regulations Section 3001 (r)).

e. The term “license” means a valid non-expired document issued by a licensing agency within the Department of Consumer Affairs or other state licensing office authorized to grant licenses and authorizing the bearer of the

document to provide certain professional services or refer to themselves using a specified professional title including but not limited to mental health and board and care services at a residential placement. If a license is not available through an appropriate state licensing agency, a certificate of registration with the appropriate professional organization at the national or state level which has standards established for the certificate that are equivalent to a license shall be deemed to be a license as defined in Title 5 of the California Code of Regulations section 3001(I).

f. "Parent" means:

- i. a biological or adoptive parent; unless the biological or adoptive parent does not have legal authority to make educational decisions for the child,
- ii. a guardian generally authorized to act as the child's parent or authorized to make educational decisions for the child,
- iii. an individual acting in the place of a biological or adoptive parent, including a grandparent, stepparent, or other relative with whom the child lives, or an individual who is legally responsible for the child's welfare,
- iv. a surrogate parent,
- v. a foster parent if the authority of the biological or adoptive parent to make educational decisions on the child's behalf has been specifically limited by court order in accordance with Code of Federal Regulations 300.30(b)(1) or (2).
- vi. Parent does not include the state or any political subdivision of government or the NPS/A under contract with the LEA for the provision of special education or designated instruction and services for a child. (California Education Code section 56028).

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

g. The term "days" means calendar days unless otherwise specified.

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

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

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

## **ADMINISTRATION OF CONTRACT**

### **8. NOTICES**

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

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

## **9. MAINTENANCE OF RECORDS**

All records shall be maintained by CONTRACTOR as required by state and federal laws and regulations. Notwithstanding the foregoing sentence, CONTRACTOR shall maintain all records for at least five (5) years after the termination of this Master Contract. For purposes of this Master Contract, “records” shall include, but not be limited to student records as defined by California Education Code section 49061(b) including electronically stored information; registers and roll books of teachers and/or daily service providers; daily service logs and notes and other documents used to record the provision of related services including supervision; daily service logs and notes used to record the provision of services provided through additional instructional assistants, NPA behavior intervention aides, and bus aides; behavior emergency reports (BER); incident reports; notification of injuries; absence verification records (parent/doctor notes, telephone logs, and related documents) if the CONTRACTOR is funded for excused absences, however, such records are not required if positive attendance is required; bus rosters; staff lists specifying credentials held and documents evidencing other staff qualifications, social security numbers, dates of hire, and dates of termination; records of employee training and certification, including verification of behavior training consistent with 56366.1; staff time sheets; non-paid staff and volunteer sign-in sheets; transportation and other related services subcontracts; school calendars; bell/class schedules when applicable; liability and worker’s compensation insurance policies; state NPS/A certifications; by-laws, if applicable; lists of current board of directors/trustees, if incorporated; statement of income and expenses; general journals; cash receipts and disbursement books; general ledgers and supporting documents; documents evidencing financial expenditures; federal/state payroll quarterly reports; evidence of electronic payments; and bank statements and canceled checks or facsimile thereof.

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

## **10. SEVERABILITY CLAUSE**

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

## **11. SUCCESSORS IN INTEREST**

This contract binds CONTRACTOR's successors and assignees. CONTRACTOR shall notify the LEA of any change of ownership or corporate control.

## **12. VENUE AND GOVERNING LAW**

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

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

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

## **14. TERMINATION**

This Master Contract or ISA may be terminated for cause at the discretion of either party; LEA or CONTRACTOR. The cause shall not be the availability of a public class initiated during the period of the contract unless the parent agrees to the transfer of the student to the public school program at an IEP team meeting. To terminate the contract either party shall give no less than twenty (20) days prior written notice (California Education Code section 56366(a)(4)). At the time of termination, CONTRACTOR shall provide to LEA any and all documents CONTRACTOR is required to maintain under this Master Contract. ISAs are void upon termination of this Master Contract, as provided in Section 5 or 6. CONTRACTOR or LEA may terminate an ISA for cause. To terminate the ISA, either party shall give twenty (20) days prior written notice.

## **15. INSURANCE**

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

### **PART I- INSURANCE REQUIREMENTS FOR NONPUBLIC SCHOOLS AND AGENCIES**

- A. **Commercial General Liability Insurance**, including both bodily injury and property damage, with limits as follows:  
\$2,000,000 per occurrence \$ 500,000 fire damage \$ 5,000 medical expenses \$1,000,000 personal & adv.

injury \$3,000,000 general aggregate \$2,000,000 products/completed operations aggregate.

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

- B. **Workers' Compensation Insurance** in accordance with provisions of the California Labor Code adequate to protect the CONTRACTOR from claims that may arise from its operations pursuant to the Workers' Compensation Act (Statutory Coverage). The Workers’ Compensation Insurance coverage must also include Employers Liability coverage with limits of \$1,000,000/\$1,000,000/\$1,000,000.
- C. **Commercial Auto Liability Insurance** for all owned, non-owned or hired automobiles with a \$1 million combined single limit.  
If no owned automobiles, then only hired and non-owned is required.  
If CONTRACTOR uses a vehicle to travel to/from school sites, between schools and/or to/from students’ homes or other locations as approved service locations by the LEA, CONTRACTOR must comply with State of California auto insurance requirements.
- D. **Errors & Omissions (E & O)/Malpractice (Professional Liability) coverage**, including Sexual Molestation and Abuse coverage, unless that coverage is afforded elsewhere in the Commercial General Liability policy by endorsement or separate policy, with the following limits:
  - \$1,000,000 per occurrence
  - \$2,000,000 general aggregate
- E. CONTRACTOR, upon execution of this contract and periodically thereafter upon request, shall furnish the LEA with certificates of insurance evidencing such coverage. The certificate of insurance shall include a ten (10) day non-renewal notice provision. The Commercial General Liability and Automobile Liability policy shall name the LEA and the Board of Education additional insured’s premiums on all insurance policies and shall be paid by CONTRACTOR and shall be deemed included in CONTRACTOR’s obligations under this contract at no additional charge.
- F. Any deductibles or self-insured retentions above \$100,000 must be declared to and approved by the LEA. At its option, LEA may require the CONTRACTOR, at the CONTRACTOR’s sole cost, to: (a) cause its insurer to reduce to levels specified by the LEA or eliminate such deductibles or self-insured retentions with respect to the LEA, its officials and employees, or (b) procure a bond guaranteeing payment of losses and related investigation.
- G. For any claims related to the services performed in connection with this Master Contract, the CONTRACTOR’s insurance coverage shall be the primary insurance with respect to the LEA, its subsidiaries, officials and employees. Any insurance or self-insurance maintained by the LEA, its subsidiaries, officials and employees shall be excess of the CONTRACTOR's insurance and shall not contribute with it.
- H. All Certificates of Insurance must reference the contract number, name of the school or agency submitting the certificate, and the location of the school or agency submitting the certificate on the certificate.

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

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

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

\$3,000,000 per Occurrence and \$6,000,000 in General Aggregate.

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

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

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

## **16. INDEMNIFICATION AND HOLD HARMLESS**

To the fullest extent allowed by law, CONTRACTOR shall indemnify and hold LEA and its Board Members, administrators, employees, agents, attorneys, volunteers, and subcontractors ("LEA Indemnities") harmless against all liability, loss, damage and expense (including reasonable attorneys' fees) resulting from or arising out of this Master Contract or its performance, to the extent that such loss, expense, damage or liability was proximately caused by negligence, intentional act, or willful act or omission of CONTRACTOR, including, without limitation, its agents, employees, subcontractors or anyone employed directly or indirectly by it (excluding LEA and LEA Indemnities). The duty and obligation to defend shall arise immediately upon tender of a claim or lawsuit to the CONTRACTOR. The Member District(s) shall have the right in their sole discretion to select counsel if it's choice to provide the defense at the sole cost of the CONTRACTOR or the applicable insurance carrier.

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

LEA represents that it is self-insured in compliance with the laws of the State of California, that the self-insurance covers district employees acting within the course and scope of their respective duties and that its



self-insurance covers the LEA's indemnification obligations under this Master Contract.

## **17. INDEPENDENT CONTRACTOR**

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

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

## **18. SUBCONTRACTING**

CONTRACTOR shall provide written notification to LEA before subcontracting for special education and/or related services pursuant to this Master Contract.

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

If LEA elects to provide such service(s), LEA shall provide written notification to CONTRACTOR within five (5) days of receipt of CONTRACTOR's original notice and CONTRACTOR shall not subcontract for said service(s).

CONTRACTOR shall incorporate all of the provisions of this Master Contract in all subcontracts, to the fullest extent reasonably possible. Furthermore, when CONTRACTOR enters into subcontracts for the provision of special education and/or related services (including; but not limited to, transportation) for any student, CONTRACTOR shall cause each subcontractor to procure and maintain insurance during the term of each subcontract. Such subcontractor's insurance shall comply with the provisions of Section 15. Each subcontractor shall furnish the LEA with original endorsements and certificates of insurance effecting coverage required by Section 15. The endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. The endorsements are to be on forms as required by the LEA. All endorsements are to be received and approved by the LEA before the subcontractor's work commences. The Commercial General Liability and Automobile Liability policies shall name the LEA/SELPA and the LEA Board of Education as additional insured.

As an alternative to the LEA's forms, a subcontractor's insurer may provide complete, certified copies of all required insurance policies, including endorsements affecting the coverage required by this Master Contract. All Certificates of Insurance must reference the LEA contract number, name of the school or agency submitting the certificate, indication if NPS or NPA, and the location of the school or agency submitting the certificate. In addition, all subcontractors must meet the requirements as contained in Section 44 Clearance Requirements and Section 45 Staff Qualifications of this Master Contract.

## **19. CONFLICTS OF INTEREST**

CONTRACTOR shall provide to LEA upon request a copy of its current bylaws and a current list of its Board

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

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

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

## **20. NON-DISCRIMINATION**

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

## **EDUCATIONAL PROGRAM**

### **21. FREE AND APPROPRIATE PUBLIC EDUCATION (FAPE)**

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

Unless otherwise agreed to between CONTRACTOR and LEA, CONTRACTOR shall be responsible for the provision of all appropriate supplies, equipment, and/or facilities, as specified in the student's IEP and ISA.

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

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

## **22. GENERAL PROGRAM OF INSTRUCTION**

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

When CONTRACTOR is a NPS, CONTRACTOR's general program of instruction shall: (a) utilize evidence-based practices and be consistent with LEA's standards regarding the particular course of study and curriculum; (b) include curriculum that addresses mathematics, literacy and the use of educational, assistive technology and transition services; (c) be consistent with CDE's standards regarding the particular course of study and curriculum; (d) provide the services as specified in the student's IEP and ISA. Students shall have access to: (a) State Board of Education (SBE) - adopted Common Core State Standards ("CCSS") for curriculum and the same instructional materials for kindergarten and grades 1 to 8, inclusive; and provide standards – aligned core curriculum and instructional materials for grades 9 to 12, inclusive, used by an LEA that contracts with the NPS: (b) college preparation courses; (c) extracurricular activities, such as art, sports, music and academic clubs; (d) career preparation and vocational training, consistent with transition plans pursuant to state and federal law and; (e) supplemental assistance, including individual academic tutoring, psychological counseling, and career and college counseling.

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

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

signed authorization by the parent or legal guardian to authorize emergency services as requested.

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

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

### **23. INSTRUCTIONAL MINUTES**

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

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

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

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

### **24. CLASS SIZE**

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

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

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

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

## **25. CALENDARS**

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

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

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

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

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

## **26. DATA REPORTING**

CONTRACTOR shall agree to provide to the LEA all data related to student information and billing information with LEA. CONTRACTOR shall agree to provide data related to all sections of this contract, including student\_discipline as noted below, and requested by and in the format required by the LEA. It is understood that all NPS/A shall utilize the LEA approved electronic IEP system for all IEP development, service tracking documentation, and progress reporting, unless otherwise agreed to by the LEA. Additional progress reporting may be required by the LEA. The LEA shall provide the CONTRACTOR with appropriate

software, user training and proper internet permissions to allow adequate access.

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

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

## **27. LEAST RESTRICTIVE ENVIRONMENT/DUAL ENROLLMENT**

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

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

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

## **28. STATEWIDE ACHIEVEMENT TESTING**

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

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

## **29. MANDATED ATTENDANCE AT LEA MEETINGS**

CONTRACTOR shall attend District mandated meetings when legal mandates, and/or LEA policy and procedures are reviewed, including but not limited to the areas of: curriculum, high school graduation, standards-based instruction, behavior intervention, cultural and linguistic needs of students with disabilities, dual enrollment responsibilities, LRE responsibilities, transition services, data collection and standardized

testing and IEPs. LEA shall provide CONTRACTOR with reasonable notice of mandated meetings. Attendance at such meetings does not constitute a billable service hour(s).

### **30. POSITIVE BEHAVIOR INTERVENTIONS AND SUPPORTS**

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

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

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

CONTRACTOR shall complete a behavior emergency report when an emergency occurs that is defined as a serious, dangerous behavior that staff has determined to present a clear and present danger to others. It requires a non-violent physical intervention to protect the safety of student, self, or others and a physical intervention has been used; or a physical intervention has not been used, but an injury or serious property damage has occurred. Personal Safety Techniques may or may not have been used. Emergencies *require* a behavior emergency report form be completed and submitted to the LEA within twenty-four (24) hours for administrative action. CONTRACTOR shall notify Parent within twenty-four (24) hours via telephone.

If the student's IEP does not contain a BIP an IEP team shall schedule a meeting to review the behavior emergency report, determine if there is a necessity for a functional behavioral assessment, and to determine an interim plan.

If the student already has a BIP, the IEP team shall review and modify the BIP if a new serious behavior has been exhibited or existing behavioral interventions have proven to be ineffective. CONTRACTOR shall schedule with LEA an IEP meeting within two (2) days.

Pursuant to Education Code section 56521.2, CONTRACTOR shall not authorize, order, consent to, or pay for

the following interventions, or any other interventions similar to or like the following:

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

CONTRACTOR shall comply with Education Code section 49005.8, 56521.1 and 56521.2. Specifically, Contractor shall not do any of the following:

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

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

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

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

All restraint practices must be reviewed and revised when they have an adverse effect on a student and are used repeatedly for an individual child, either on multiple occasions within the same classroom or multiple uses by



the same individual. CONTRACTOR shall notify the student's parent/guardian when any type of physical or mechanical restraint or seclusion has been used. Upon the use of any type of physical or mechanical restraint or seclusions of a LEA student, CONTRACTOR shall complete a BER per the reporting and notification requirements listed above.

### **31. STUDENT DISCIPLINE**

CONTRACTOR shall maintain and abide by a written policy for student discipline that is consistent with state and federal law and regulations. Using forms developed by the California Department of Education or as otherwise mutually agreed upon by CONTRACTOR and LEA, CONTRACTOR shall provide LEA, on a monthly basis, a written report of all incidents in which a statutory offense is committed by any LEA student, regardless if it results in a disciplinary action of suspension or expulsion. This includes all statutory offenses as described in Education Code 48900 and 48915. CONTRACTOR shall also include incidents resulting in the use of a behavioral restraint and/or seclusion even if they were not a result of a violation of Education Code Sections 48900 and 48915.

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

### **32. IEP TEAM MEETINGS**

An IEP team meeting shall be convened at least annually to evaluate: (1) the educational progress of each student placed with CONTRACTOR, including all state assessment results pursuant to the requirements of Education Code section 52052; (2) whether or not the needs of the student continue to be best met at the NPS; and (3) whether changes to the student's IEP are necessary, including whether the student may be transitioned to a public school setting. (California Education Code sections 56366 (a) (2) (B) (i) and (ii) and pursuant to California Education Code section 56345 (b) (4).)

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

It is understood that the CONTRACTOR shall utilize the approved electronic IEP system of the LEA for all

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

Changes in any student's educational program, including instruction, services, or instructional setting provided under this Master Contract, may only be made on the basis of revisions to the student's IEP. In the event that the CONTRACTOR believes the student requires a change of placement, the CONTRACTOR may request a review of the student's IEP for the purposes of consideration of a change in the student's placement. Student is entitled to remain in the last agreed upon and implemented placement unless parent agrees otherwise or an Interim Alternative Educational Setting is deemed lawful and appropriate by LEA or OAH consistent with Section 1415 (k)(1)(7) of Title 20 of the United States Code.

IEP Team Meetings. Where a contractor (i.e., a non-employee) of the provider of related services to a student pursuant to an IEP is a member of the IEP team and requested to be present at an IEP team meeting, LEA shall be responsible for charges due for that provider's contractor in attendance at the IEP meeting in accordance with the Rate Schedule, (Exhibit A) in the Master Agreement. The rate for such attendance shall be at the individual rate if more than one rate is listed in the Rate Schedule (Exhibit A).

### **33. SURROGATE PARENTS AND FOSTER YOUTH**

CONTRACTOR shall recognize LEA appointed surrogate parent assignments for students without parental representation, including unaccompanied homeless youths, in special education procedures pursuant to California Government Code Section 7579.5. Surrogate parents shall serve as the child's parent and have all the rights relative to the student's education that a parent has under the Individuals with Disabilities Education Act pursuant to *20 USC 1414-1482 and 34 CFR 300.1-300.756*. A pupil in foster care shall be defined pursuant to California Education Code section 42238.01(b). The LEA shall annually notify the CONTRACTOR who the LEA has designated as the educational liaison for foster children. When a pupil in foster care is enrolled in a NPS by the LEA any time after the completion of the pupil's second year of high school, the CONTRACTOR shall schedule the pupil in courses leading towards graduation based on the diploma requirements of the LEA unless provided notice otherwise in writing pursuant to Section 51225.1.

### **34. DUE PROCESS PROCEEDINGS**

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

### **35. COMPLAINT PROCEDURES**

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

### **36. STUDENT PROGRESS REPORTS/REPORT CARDS AND ASSESSMENTS**

Unless LEA requests in writing that progress reports be provided on a monthly basis, CONTRACTOR shall provide to parents at least four (4) written progress reports/report cards. At a minimum, progress reports shall include progress over time towards IEP goals and objectives. A copy of the progress reports/report cards shall be maintained at the CONTRACTOR’s place of business and shall be submitted to the LEA and LEA student’s parent(s) quarterly. Or as required by a pupil’s IEP.

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

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

The CONTRACTOR is responsible for all evaluation costs regarding the updating of goals and objectives, progress reporting and development of present levels of performance. All assessments resulting from an assessment plan shall be provided by the LEA unless the LEA specifies in writing a request that CONTRACTOR perform such additional assessments. Any assessment and/or evaluation costs may be added to the ISA and/or approved separately by the LEA and at the LEA’s sole discretion.

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

CONTRACTOR shall not charge the student’s parent(s) or LEA for the provision of progress reports, report cards, evaluations conducted in order to obtain present levels of performance, interviews, and/or meetings. It is understood that all billable hours have limits to those specified on the ISA consistent with the IEP. It is

understood that copies of data collection notes, forms, charts and other such data are part of the pupil's record and shall be made available to the LEA upon written request.

### **37. GRADES, HIGH SCHOOL COURSE CREDITS & TRANSCRIPTS**

When CONTRACTOR is an NPS, CONTRACTOR is responsible for assigning grades for any course of instruction taught at the NPS. The grades determined by the pupil's teacher, in the absence of clerical or mechanical mistake, fraud, bad faith, or incompetency, shall be final and consistent with the provisions specified in *EC* Section 49066. The grades each pupil receives in all courses of instruction taught by the NPS shall be reported to the parents and the LEA on a quarterly basis. Consistent with the LEA, should it become evident to the NPS the pupil is in danger of failing a course, the CONTRACTOR must initiate a parent conference, and the LEA representative must be in attendance.

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

Pupil enrolled in high school during the 2020-2021 academic year may request a Pass or No Pass grade as permitted in *EC* Section 49066.5, which may be reflected on the student's transcript and shall not negatively affect the pupil's grade point average.

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

#### INDIVIDUAL TRANSITION PLANNING – AB 438, Approved on September 28, 2024

Effective July 1, 2025, if determined appropriate by the pupil's IEP team, beginning when the pupil starts their high school experience and not later than when the pupil is 16 years of age or younger, as appropriate, and annually thereafter, a statement of needed transition services shall be included in the pupil's individualized education program. If the individualized education program team determines that the pupil would benefit from the postponement of the inclusion of appropriate measurable postsecondary goals and transition services until 16 years of age, rather than when the pupil begins their high school experience, the individualized education program team shall appropriately justify the basis for that postponement. ( *EC* section 56043 (h))

### **38. STUDENT CHANGE OF RESIDENCE**

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

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

### **39. WITHDRAWAL OF STUDENT FROM PROGRAM**

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

### **40. PARENT ACCESS**

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

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

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

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

### **41. LICENSED CHILDREN'S INSTITUTION ("LCI") CONTRACTORS AND RESIDENTIAL TREATMENT CENTER ("RTC") CONTRACTORS**

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

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

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

IEP at the time of enrollment. A copy of the current IEP shall be provided to the LEA.

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

In addition to meeting the certification requirements of the State of California, a CONTRACTOR that operates a program outside of this State shall be certified or licensed by that state to provide, respectively, special education and related services and designated instruction and related services to pupils under the federal IDEA Act (20 U.S.C. Sec. 1400 et seq.) and shall be certified or licensed by the state to provide nonmedical care, clinical services, or short-term residential therapeutic programs, as applicable to the facility type.

#### **42. STATE MEAL MANDATE**

When CONTRACTOR is a NPS, CONTRACTOR and LEA shall satisfy the State Meal Mandate under California Education Code sections 49005 et seq.; 49501.5, the universal meal mandate enacted by AB 130 (2021-2022); 49530 et seq.; and 49550 et seq.

LEA, at its sole discretion, may elect to directly provide meals to CONTRACTOR for distribution to LEA students at the nonpublic school on its own or by another local school district.

CONTRACTOR acknowledges that the LEA does not receive any state or federal reimbursement for any meals CONTRACTOR provides to LEA students and that CONTRACTOR is only eligible to receive direct reimbursement if it is an approved site under the National School Lunch Program.

In the event the LEA requests CONTRACTOR to provide meals to LEA students, CONTRACTOR will provide breakfast and lunch to the LEA students in compliance with the meal pattern requirements under the School Breakfast Program and National School Lunch Program nutritional standards. LEA shall reimburse CONTRACTOR for each meal made available at a mutually agreed upon rate. In the event CONTRACTOR is unable to provide meals, the LEA and CONTRACTOR will work collaboratively to find a solution. In the event CDE determines that meals do not need to be provided, this paragraph shall not apply.

CONTRACTOR shall maintain all documentation of meals provided to LEA students, CONTRACTOR shall comply with record keeping requirements under the School Breakfast Program and the National School Lunch Program or LEA template. Upon request, CONTRACTOR shall provide copies of such records to LEA. CONTRACTOR shall also allow LEA to conduct site monitoring visits as deemed necessary by the LEA.

If CONTRACTOR uses a third-party vendor to provide meals, CONTRACTOR will assure that the third-party vendor agrees to comply with all meal pattern requirements of the School Breakfast Program and National School Lunch Program nutritional standards. Upon request, CONTRACTOR shall provide LEA with any contracts it has with third-party vendors providing meals for students.

#### **43. MONITORING**

The State Superintendent of Public Instruction ("Superintendent") through the delegated monitoring activities to the California Department of Education (CDE), shall monitor CONTRACTOR'S facilities, the educational environment, and the quality of the educational program, including the teaching staff, the credentials authorizing service, the standards-based core curriculum being employed, and the standard focused instructional materials used on a three-year cycle, as follows: (1) CONTRACTOR shall complete a self-review

in year one; (2) the Superintendent shall conduct an onsite review in year two; and (3) the Superintendent shall conduct a follow-up visit in year three.

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

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

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

The LEA or SELPA shall conduct at least one onsite monitoring visit during each school year to the CONTRACTOR site certified as an NPS where the LEA has placed a pupil and entered a master contract. The monitoring visit shall include, but is not limited to, a review of services specified on the ISA and provided to the pupil, a review of progress the pupil is making toward the goals set forth in the pupil's IEP, a review of progress the pupil is making towards the goals set forth in the pupil's behavioral intervention plan, if applicable, an observation of the pupil during instruction, and a walkthrough of the facility. The LEA or SELPA shall report the findings resulting from the monitoring visit to the CDE within 60 calendar days of the onsite visit.

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

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

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

## **PERSONNEL**

### **44. CLEARANCE REQUIREMENTS**

CONTRACTOR shall comply with the requirements of California Education Code sections 44237, 35021.1, 35021.2, and 56366.1 including, but not limited to: obtaining clearance from both the California Department of Justice (hereinafter referred to as "CDOJ") and clearance from the Federal Bureau of Investigation (hereinafter referred to as "FBI") for CONTRACTOR's employees and volunteers who will have or likely may have any direct contact with LEA students. CONTRACTOR hereby agrees that CONTRACTOR's employees and volunteers shall not come in contact with students in person or virtually until CDOJ and FBI clearance are ascertained. CONTRACTOR shall certify in writing to LEA that none of its employees, and volunteers, unless

CONTRACTOR determines that the volunteers will have no direct contact with students, or subcontractors who may come into contact with students have been convicted of a violent or serious felony as those terms are defined in California Education Code section 44237(h), unless despite the employee's conviction of a violent or serious felony, he or she has met the criteria to be eligible for employment pursuant to California Education Code section 44237 (i) or (j). Upon requests, clearance certification shall be submitted to the LEA. In addition, CONTRACTOR shall make a request for subsequent arrest service from CDOJ as required by California Penal Code section 11105.2 CONTRACTOR shall certify to LEA that they have successful background checks and enrolled in subsequent arrest notification service for all employees who may come into contact with students.

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

#### **45. STAFF QUALIFICATIONS**

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

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

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

CONTRACTOR shall comply with personnel standards and qualifications regarding instructional aides and teacher assistants respectively pursuant to federal requirements and California Education Code sections 45340



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

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

#### **46. VERIFICATION OF LICENSES, CREDENTIALS & OTHER DOCUMENTS**

CONTRACTOR shall submit to LEA a staff list, and copies of all current licenses, credentials, certifications, permits and/or other documents which entitle the holder to provide special education and/or related services by individuals employed, contracted, and/or otherwise hired or sub-contracted by CONTRACTOR. CONTRACTOR shall ensure that all licenses, credentials, permits or other documents are on file at the office of the County Superintendent of Schools. CONTRACTOR shall provide the LEA with the verified dates of fingerprint clearance, Department of Justice clearance and Tuberculosis Test clearance for all employees, approved subcontractors and/or volunteers prior to such individuals starting to work with any student.

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

#### **47. STAFF ABSENCE**

When CONTRACTOR is a nonpublic school; and CONTRACTOR's classroom teacher is absent, CONTRACTOR shall provide an appropriately credentialed substitute teacher in the absent teacher's classroom in accordance with California Education Code section 56061. CONTRACTOR shall provide to the LEA documentation of substitute coverage. Substitute teachers shall remain with their assigned class during all instructional time.

The LEA shall not be responsible for any payment for instruction and/or services when an appropriately credentialed substitute teacher is not provided in accordance with California Education Code section 56051.

When CONTRACTOR is a NPA and/or related services provider, and CONTRACTOR's service provider is absent, CONTRACTOR shall provide a qualified (as defined in Section 7 of this agreement and as determined by LEA) substitute, unless LEA provides appropriate coverage in lieu of CONTRACTOR's service providers. It is understood that the parent of a student shall not be deemed to be a qualified substitute for their student. LEA will not pay for services unless a qualified substitute is provided and/or CONTRACTOR provides documentation evidencing the provision of "make-up" services by a qualified service provider within thirty (30) calendar days from the date on which the services should have been provided. CONTRACTOR shall not "bank" or "carry over" make up service hours under any circumstances, unless otherwise agreed to in writing by CONTRACTOR and authorized LEA representative.

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

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

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

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

### **HEALTH AND SAFETY MANDATES**

#### **49. HEALTH AND SAFETY**

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

CONTRACTOR shall comply with OSHA Blood-Borne Pathogens Standards, 29 Code of Federal Regulations (CFR) section 1910.1030, when providing medical treatment or assistance to a student. CONTRACTOR further agrees to provide annual training regarding universal health care precautions and to post required

notices in areas designated in the California Health and Safety Code.

## **50. FACILITIES AND FACILITIES MODIFICATIONS**

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

## **51. ADMINISTRATION OF MEDICATION**

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

## **52. INCIDENT/ACCIDENT REPORTING**

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

## **53. CHILD ABUSE REPORTING**

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

**54. SEXUAL HARASSMENT**

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

**55. REPORTING OF MISSING CHILDREN**

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

**FINANCIAL****56. ENROLLMENT, CONTRACTING, SERVICE TRACKING, ATTENDANCE REPORTING, AND BILLING PROCEDURES**

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

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

CONTRACTOR shall maintain separate registers for the basic education program, each related service, and services provided by instructional assistants, behavior intervention aides and bus aides. Original attendance forms (i.e., roll books for the basic education program, service tracking documents and notes for instructional assistants, behavioral intervention aides, bus aides, and each related service) shall be completed by the actual service provider whose signature shall appear on such forms and shall be available for review, inspection, or audit by LEA during the effective period of this contract and for a period of five (5) years thereafter. CONTRACTOR shall verify the accuracy of minutes of reported attendance that is the basis of services being billed for payment.

CONTRACTOR shall submit invoices and related documents to LEA for payment, for each calendar month when education or related services were provided. Invoices and related documents shall be properly submitted electronically and in addition, on an LEA form with signatures in the manner prescribed by LEA. At a minimum, each invoice must contain the following information: month of service; specific days and times of services coordinated by the LEA approved calendar unless otherwise specified in the IEP or agreed to by the LEA; name of staff who provided the service; approved cost of each invoice; total for each service and total for the monthly invoice; date invoice was mailed; signature of NPS/NPA administrator authorizing that the

information is accurate and consistent with the ISA, CDE certificates and staff notification; verification that attendance report is attached as appropriate; indication of any made-up session consistent with this contract; verification that progress reports have been provided consistent with the ISA (monthly or quarterly unless specified otherwise on the ISA); and name or initials of each student for when the service was provided.

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

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

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

In no case shall initial payment claim submission for any Master Contract fiscal year (August-July) extend beyond December 31st after the close of the fiscal year. In no case shall any rebilling for the Master Contract fiscal year (August-July) extend beyond six (6) months after the close of the fiscal year unless approved by the LEA to resolve billing issues including re-billing issues directly related to a delay in obtaining information from the Commission on Teacher Credentialing regarding teacher qualification, but no later than twelve (12) months from the close of the fiscal year. If the billing or re-billing error is the responsibility of the LEA, then no limit is set provided that the LEA and CONTRACTOR have communicated such concerns in writing during the 12-month period following the close of the fiscal year. LEA will not pay mileage for NPA employee.

## **57. RIGHT TO WITHHOLD PAYMENT**

LEA may withhold payment to CONTRACTOR when: (a) CONTRACTOR has failed to perform, in whole or in part, under the terms of this contract; (b) CONTRACTOR has billed for services rendered on days other than billable days of attendance or for days when student was not in attendance and/or did not receive services; (c) CONTRACTOR was overpaid by LEA as determined by inspection, review, and/or audit of its program, work, and/or records; (d) CONTRACTOR has failed to provide supporting documentation with an invoice, as required by EC 56366(c)(2); (e) education and/or related services are provided to students by personnel who are not appropriately credentialed, licensed, or otherwise qualified; (f) LEA has not received prior to school closure or contract termination, all documents concerning one or more students enrolled in CONTRACTOR's educational program; (g) CONTRACTOR fails to confirm a student's change of residence to another district or confirms the change of residence to another district, but fails to notify LEA within five (5) days of such confirmation; or (h) CONTRACTOR receives payment from Medi-Cal or from any other agency or funding source for a service provided to a student. It is understood that no payments shall be made for any invoices that are not received by six (6) months following the close of the prior fiscal year, for services provided in that year.

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

that remain uncorrected.

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

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

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

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

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

## **58. PAYMENT FROM OUTSIDE AGENCIES**

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

## **59. PAYMENT FOR ABSENCES**

### **NONPUBLIC SCHOOL STAFF ABSENCE**

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

Whenever a related service provider is absent, CONTRACTOR shall provide a qualified (as defined in Section 7 of this agreement and as determined by LEA) substitute. LEA will not pay for services unless a qualified substitute is provided and/or CONTRACTOR provides documentation evidencing the provision of "make-up" services by a qualified service provider within thirty (30) calendar days from the date on which the services should have been provided unless otherwise agreed in student's IEP.

### **NONPUBLIC SCHOOL STUDENT ABSENCE**

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

#### **Excused Absence Method**

- A. LEA shall not be responsible for payment for more than 8 cumulative days of absences, for each of the first ninety days and second ninety days of the school year (i.e., semester), unless a written time extension is granted by LEA. No more than three of the 8 cumulative absences shall be unexcused. Reimbursements for Related Services cannot be claimed except in the case of a Bundled tuition rate.
- B. On the 4th consecutive day of a pupil's absence, CONTRACTOR shall notify LEA of such absence. If CONTRACTOR fails to provide such notice by the 4th day of consecutive absence, CONTRACTOR shall not be compensated for services delivered during continuing absence after the 4th consecutive day of excused absence.
- C. All excused absences must be verified and a copy must be submitted to LEA with the monthly invoice. All documentation must be kept for at least five (5) years from the date of origination.
- D. Only the individuals listed below may verify the reason for absence:
  - 1. School or public health nurse
  - 2. Physician
  - 3. Principal
  - 4. Teacher
  - 5. School employee assigned to make such verification
  - 6. Student eighteen years of age or over
  - 7. Parent
- E. Any reasonable method which established the reason for the absence may be used:
  - 1. Written note from parent, guardian, representative or adult pupil (over 18 or emancipated)
  - 2. Telephone conversation with parent, guardian, representative, or adult pupil (over 18 or emancipated)

- F. Standards for excused absences are defined in the education code. Contractor is responsible for verification of excused absence in accordance with current requirements.

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

#### STUDENT ABSENCES AS IT RELATES TO ENHANCED STAFFING (1:1 AIDES)

To the extent an absent student is supported by instructional assistance or behavior intervention (enhanced staffing), LEA shall compensate CONTRACTOR for the daily rate for the enhanced staffing assistance for each day of absence in accordance with Section 59.A of the Master Contract in which it states, "LEA shall not be responsible for payment for more than 8 cumulative days of absences, for each of the first ninety days and second ninety days of the school year, (i.e. semester), unless the LEA grants a written time extension. No more than three of the 8 cumulative absences shall be unexcused.

#### NONPUBLIC AGENCY STAFF ABSENCE

When CONTRACTOR is a nonpublic agency and CONTRACTOR's service provider is absent, CONTRACTOR shall provide a qualified (as defined in Section 7 of this agreement and as determined by LEA) substitute, unless LEA provides appropriate coverage in lieu of CONTRACTOR's service providers. LEA shall not pay for services unless a qualified substitute is provided and/or CONTRACTOR provides documentation evidencing the provision of "make-up" services by a qualified service provider within thirty (30) calendar days from the date on which the services should have been provided. CONTRACTOR shall not "bank" or "carry over" make up service hours under any circumstances, unless otherwise agreed to in writing by CONTRACTOR and LEA. In the event services were not provided, reasons for why the services were not provided shall be included.

#### NONPUBLIC AGENCY STUDENT ABSENCE

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

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

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

- a) If CONTRACTOR remains open, if allowed, during an emergency and serves students appropriately as delineated in the ISA, CONTRACTOR shall receive payment, regardless of whether a sending LEA is open or closed.
- b) NPS School Closure - In the event of a NPS School Closure for the reasons set forth in Education Code



section 41422, if the LEA is able to obtain alternative placement for the student, CONTRACTOR shall not receive payment for days the student is not in attendance due to CONTRACTOR's school closure. If the LEA is unable to obtain alternative placement, CONTRACTOR shall receive payment consistent with the student's approved ISA, as though the student were continuing his/her regular attendance, until an alternative placement can be found and implement LEA student IEP in accordance with Education Code section 56345(a)(9) pertaining to emergency conditions.

- c) LEA and NPS School Closure- In the event of the LEA and NPS School Closures, on days the LEA is funded, CONTRACTOR shall receive payment consistent with the student's approved ISA, until an alternative placement can be found and implement LEA student IEP in accordance with Education Code section 56345(a)(9) pertaining to emergency conditions. If the LEA is able to obtain alternative placement for the student, CONTRACTOR shall not receive payment for days the student is not in attendance with CONTRACTOR due to CONTRACTOR'S school closure.

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

## **61. INSPECTION AND AUDIT**

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

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

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

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

If an inspection, review, or audit by LEA, a state agency, a federal agency, and/or an independent agency/firm

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

## **62. RATE SCHEDULE; EXHIBIT A**

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

Special education and/or related services offered by CONTRACTOR shall be provided by qualified personnel as per State and Federal law, and the codes and charges for such educational and/or related services during the term of this contract, shall be as stated in Exhibit A.

## **63. DEBARMENT CERTIFICATION**

By signing this agreement, the CONTRACTOR certifies that:

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

The parties hereto have executed this Contract by and through their duly authorized agents or representatives. This contract is effective on the  1<sup>st</sup>  day of August, 2025 and terminates at 5:00 P.M. on July 31, 2026, unless sooner terminated as provided herein.

**CONTRACTOR**

**LEA**

\_\_\_\_\_  
**Nonpublic School/Agency**

\_\_\_\_\_  
**LEA Name**

By: \_\_\_\_\_  
**Signature Date**

By: \_\_\_\_\_  
**Signature Date**

\_\_\_\_\_  
**Name and Title of Authorized Representative**

\_\_\_\_\_  
**Name and Title of Authorized Representative**

**Notices to CONTRACTOR shall be addressed to:**

**Notices to LEA shall be addressed to:  
 Sarah Tomkiel**

\_\_\_\_\_  
**Name and Title**

\_\_\_\_\_  
**Name and Title**

\_\_\_\_\_  
**Nonpublic School/Agency/Related Service Provider**

\_\_\_\_\_  
**LEA**

\_\_\_\_\_  
**Address**

\_\_\_\_\_  
**Address**

\_\_\_\_\_  
**City State Zip**

\_\_\_\_\_  
**City State Zip**

\_\_\_\_\_  
**Phone Fax**

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**Phone Fax**

\_\_\_\_\_  
**Email**

\_\_\_\_\_  
**Email**



### EACS SEPTEMBER 2025 - HANDBOOK REVISIONS

*Recommended for board approval to align with new provisions and update language for clarity*

<i>Section</i>	<i>Item</i>
<p><b><u>Section</u></b>  <b>Instructional</b>  <b>Funds and</b>  <b>Content and</b>  <b>Community</b>  <b>Provider Policies</b></p>	<p><i>Revised</i></p> <ul style="list-style-type: none"> <li>• Revised Additional Documents for Parent Use area to include a Parent Training on How to Place an Order</li> <li>• Removed Disallowed items list and replaced with Approved Materials and included link to the Ordering Guide</li> </ul> <p><i>Added</i></p> <ul style="list-style-type: none"> <li>• Added in “Types of Community Providers” sub section</li> </ul>



## Excel Academy Charter School Handbook 2025-2026

Dear Parents and Students,

Welcome to the 2025-2026 school year at Excel Academy Charter School, a proud recipient of the California Distinguished School award! We are honored to have you as part of our vibrant learning community and excited to embark on a year filled with growth, collaboration, and achievement.

At Excel Academy, we recognize that every student's learning journey is unique. Whether learning takes place at home, in the community, through hands-on projects, or in collaborative group settings, our personalized and virtual learning models ensure that each student is supported in a way that maximizes their potential. Diversity in learning environments, skills, and experiences strengthens our school community, and by working together, we create an inclusive atmosphere where every student can thrive.

This handbook is designed to provide clarity on policies, expectations, and procedures. Should you have any questions, please don't hesitate to reach out to your teacher of record or our administration. We are here to support you every step of the way.

Together, let's make this school year one of teamwork, perseverance, and celebration—because at Excel Academy, we don't just learn, we SOAR!

Sincerely,

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

Executive Director

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

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## Who We Are

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

### **Mission Statement**

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



# What we are all about: Our Vision

**C** Compassion, Creativity ,  
Collaboration, Challenge, &  
Confidence.

**H** Helpful, Hands-On , Humility,  
& Happiness.

**O** Optimism, Options,  
Opportunities, Ownership, &  
Others

**I** Independence,  
Individualization,  
Inspiration, & Investigation

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

**E** Education, Equity,  
Enjoyment. Exploration &  
Empowerment

## **Schoolwide Learning Outcomes**

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

### **Self-Directed, Critical Thinkers who**

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

### **Resourceful, Lifelong Learners who**

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

### **Respectful, Responsible Citizens who**

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

## **Charter Authorization**

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

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

## **WASC Accreditation**

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

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

### **What does Accreditation mean?**

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

### **Why Consider Accreditation?**

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

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

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

# Contacts

## Parent Support

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

## Contact Information

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

Office Phone Number: (949) 387-7822

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

**Admissions** - [admissions@excelacademy.education](mailto:admissions@excelacademy.education)

**Registrar** - [registrar@excelacademy.education](mailto:registrar@excelacademy.education)

### Business Services -

Purchasing - [purchasing@excelacademy.education](mailto:purchasing@excelacademy.education)

CCP Relations - [ccprelations@excelacademy.education](mailto:ccprelations@excelacademy.education)

Accounts Payable - [accountspayable@excelacademy.education](mailto:accountspayable@excelacademy.education)

**Intervention** - [tmurphy@excelacademy.education](mailto:tmurphy@excelacademy.education)

Elementary Counseling-[cforester@excelacademy.education](mailto:cforester@excelacademy.education)

Elementary Education- [asaade@excelacademy.education](mailto:asaade@excelacademy.education)

Secondary Counseling - [lallenjefferson@excelacademy.education](mailto:lallenjefferson@excelacademy.education) &  
[dfavela@excelacademy.education](mailto:dfavela@excelacademy.education)

Secondary Education - [lwood@excelacademy.education](mailto:lwood@excelacademy.education)

Testing & Assessments - [jcraig@excelacademy.education](mailto:jcraig@excelacademy.education)

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

## Special Education:

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

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

**Intervention Coordinator** - Tamara Murphy

PH: 951-290-2949

Or

**School Psychologist** - Noell Scott

PH: 949-382-1198

## Enrollment

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

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

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

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

### Enrollment Documents Required

- Proof of Residency
- Birth Certificate
- Immunization Records
- Transcripts (high school only)
- Progress Report\*
- Oral Health Report Form or waiver (TK, KN and 1st Grade only)
- Health Exam Form/Waiver (TK, KN and 1st Grade only)

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

### Private School Affidavit (PSA)



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

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

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

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

## Grade-Level Assignment

At Excel Academy, students are enrolled in the grade that most closely corresponds to their age, in accordance with California State Law. Please see link below for Excel Academy's Grade Placement Chart: [Excel Grade Placement Chart 2025/2026](#)

## Transitional Kindergarten (TK) Policy

TK is an option for the following students:

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

## Kindergarten Placement

Students must turn 5 on or before September 1.

## High School Grade-Level Placement

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

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

### **Adult Student Enrollment**

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

### **Dual Enrollment Policy – Public and Private Schools**

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

## **Acceleration & Retention: Policies & Processes**

### **Acceleration**

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

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

### **Acceleration Requests**

1. Parents will send a letter to the Principal stating reasons why they are requesting acceleration.
  - a. Parents will provide any additional relevant information (i.e. report cards, transcripts, or assessment results received outside of EACS)

2. The Acceleration Team reviews information to determine if an acceleration meeting is warranted or if a decision can be made based on the letter.
  - a. If a meeting is warranted, it will be scheduled with the Parent and Acceleration Team.
3. A decision is made by the Acceleration Team and a decision letter is sent to the parent via email.

## **Retention**

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

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

## **Retention Requests**

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

## **8th Grade Retention & Promotion**

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

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

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

## **Student with an Expulsion History**

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

## **Master Agreement**

The Master Agreement is a binding agreement between Excel Academy, the student, the parent/guardian, the supervising ToR, and other team members responsible for the student's educational progress. The agreement documents assigned courses as well as the time, manner, and frequency of the student's meetings with the faculty. In addition, the Master Agreement addresses specific resources including materials and personnel that will be made available to all students, academic and other supports, missed assignments, satisfactory progress and required parent communication to address pupils not generating attendance. Each agreement can be signed prior or up to the first day of the student's attendance start date.

Understand that if a student's Master Agreement requires a Master Agreement Addendum (MAA) to amend the agreement, the MAA must be signed and returned within five days of the MAA being sent to the parent/guardian. If the MAA is not signed within 5 days by the student, parent/guardian, and teacher of record, the student may be disenrolled from Excel Academy.

# Methods of Operation and Glossary of Terms

## Learning Options

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

- Personalized Elementary
- Personalized Secondary
- Virtual Pathway

### **Personalized Elementary (TK-6)**

In this path, students are educated through flex-based instruction, where the parent/guardian is the primary instructor, and the Excel Teacher of Record (ToR) oversees the student's education. Parents are able to choose from a selection of standards-aligned curriculum options based on the specific needs of their student (Curriculum can include textbook and online options). Each student's curriculum is paced out by the ToR for the school year, with clear expectations for what the student is to complete each learning period. The ToR, parent/guardian and student will meet together to review the student's body of work and academic progress at the end of each Learning Period (LP). TK-6th grade students meet with their ToR each LP varying between in-person and virtual meetings.

### **Personalized Secondary (7-12)**

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

### **Virtual Pathway (K-8)**

In this path, students learn in a virtual classroom setting with a group of their peers five days a week, receiving instruction in all core subjects and working independently for the remainder of the day.

- Direct instruction provided by a credentialed Virtual Teacher

- 100% Virtual Learning and Meetings
- Classrooms split by grade level for K-5th, and by subject for 5th-8th
- Regular connection with peers in an online platform
- Quality, standards-aligned curriculum, assigned by the teacher

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

## **General Terms**

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

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

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

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

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

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

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

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

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

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

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

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

**Virtual Pathway** - An academic pathway option for students in K-8th grade. In this path, students learn in an online classroom with a group of their peers five days a week, receiving live instruction for all core subjects by their assigned teacher.

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

### **Business Services Department Terms**

**CCP** - Content and Community Provider

**EMR**- Educational Materials Request

**VCI**- Educational Services

**OPS**- Online Purchasing System. The system used at Excel Academy for ordering educational materials and services.

**Red Notes**- Individual guidelines for placing orders.

**Internal Notes**- Notes placed on orders after they have been created. Method for admin and ToRs to communicate about a specific order.

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

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

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

**Prepending:** 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, OR the ToR has placed the order on behalf of the parent (*orders placed by ToR are assumed to have been carefully reviewed*).

**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 Full (EMR ONLY):** ToR has indicated that all items on the order have been received.

**Invoice Matched:** Excel Academy has received the invoice from the CCP and matched the order in OPS to match what the CCP is charging.

**Paid (VCI ONLY):** Invoice has been submitted to our back office for NET 30 payment. *This does not mean that payment has been sent to the CCP.*

## **Methods of Operation**

### **Body of Work**

*For Personalized Path Students only:* A body of work should reflect 15-25 days of learning, depending on the length of the Learning Period. A pacing guide is provided for each subsequent Learning Period to assign the learning for each subject area for grades TK-8 and for each course in grades 9-12. All work should be graded or evaluated by the home educator and/or from the service provider. At each LP meeting, the ToR will collect and review a generous sampling from the body of work in each subject/course that is an accurate representation of the student's mastery and work completed. Formative assessments may be requested to validate any learning which occurred during the respective LP. The ToR will file these samples as proof of student daily attendance and progress.

### **Student Pacing and the Assessment of Learning**

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



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

### **Attendance Roll Sheet/Grid Log**

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

### **Progress Improvement Notification (PIN) and Identified Assignments**

In order to remain enrolled at Excel Academy, the responsibilities outlined in the Master Agreement, Independent Study Policy, Acknowledgement of Responsibilities, Involuntary Withdrawal Policy, and Civility Policy must be followed. Within these policies, the process for which a student may be involuntarily withdrawn from Excel Academy is outlined. Part of that process includes the issuance of Progress Improvement Notifications (PINs) when a student fails to complete identified assignments key to a student's success in the independent study environment or any other responsibilities outlined in the EACS Handbook, Acknowledgement of Responsibilities, and Master Agreement. These identified assignments include, but are not limited to, completion of assigned work (CORE, ELD, WIN), internal assessments, attendance at mandatory meetings, and other key responsibilities outlined within the Excel Academy Board Policies and EACS Handbook.

### **Behavior Improvement Plan Process**

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

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

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

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

### **Eagle's Nest & School Newsletter**

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

# Meeting Types

## Attendance Intervention Meeting (AIM)

A meeting that occurs after a student receives their second PIN. The purpose of the AIM will be to review requirements of independent study and the responsibilities of the student and the home educator. During this meeting, families are encouraged to consider the independent study program's impact on the pupil's achievement and well-being, consistent with the evaluation for satisfactory progress as defined by the board policy. If the student and parent/guardian elect to stay enrolled, the team will develop a plan to help support the student to make satisfactory educational progress, including additional resources and support.

## Initial Contact Meeting

For students participating in the Personalized Paths, once a ToR has been assigned to a family, they will reach out to schedule an introductory meeting. During this meeting, the ToR will explain the school requirements and go over curriculum options. Parents/Guardians must provide their ToR with their curricular choices that cover grade-level content standards within 10 days of a student's start date with Excel Academy. If the parent/guardian fails to decide upon curricula that cover grade-level content standards within the 10 day window, the ToR will order the student curricula from Excel Academy's grade-level recommendations.

## Learning Period (LP) Meetings

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

## **Parent-Teacher Conferences**

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

# School Policies, Procedures & Regulations

## School Safety Plan

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

## School Communication Responsibilities

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

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

## Email Accounts

A valid, working email account is required for all Teachers of Record and parents, and is provided to students for optional use. Parents and students must provide contact information,

which can include email, phone number, and mailing address. If a Teacher of Record, student, or parent/guardian's email address, mail address, IM address, or phone number changes, it must be updated with Excel Academy Admissions at [admissions@excelacademy.education](mailto:admissions@excelacademy.education) within five (5) business days. In case of an emergency, it is important that this information is kept current.

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

### **Phone and Text Communication**

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

### **Tone of Contact**

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

### **Authorized Contacts**

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

### **Internet/Computer System Acceptable Use Policy (AUP)**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- Using the school funded internet/computer system for illegal, inappropriate, or obscene purposes or in support of such activities.



- Utilizing the school funded internet/computer system for any illegal activity including violation of copyrights or other contracts relating to licensed uses.
- Intentionally disrupting equipment of system performance.
- Downgrading the equipment or system performance.
- Damaging or misusing any hardware or software.
- Utilizing the school's computing resources for commercial/financial gain or fraud.
- Pirating and/or theft of data, equipment, or intellectual property.
- Gaining or seeking to gain unauthorized access to resources or entities.
- Utilizing the system to encourage the use of drugs, alcohol or tobacco or any promotion or attempt to promote any unethical behavior.
- Using harassing, abusive or obscene language.
- Annoying, harassing or intentionally offending another person.
- Introducing computer viruses into the system.
- Forging electronic mail messages or using an access owned by, or used by another.
- Wasting of resources.
- Invading the privacy of others.
- Possessing data in any form (including hard copy or disk) which might be considered a violation of these rules.

### **Zoom Disclaimer**

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

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

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

- By accepting the Zoom meeting ID and joining the meeting you agree to the terms set out in this document and [Zoom Acceptable Use Guidelines](#).
- Participants should be dressed appropriately.
- The meeting ID is to remain confidential and not to be shared to anyone that it was not designated to.

- Recording, photos or screenshots of the Zoom meeting are not allowed by participants.
- For participants some Zoom facilities will be disabled by the host teacher. This includes but is not limited to the screen record function, chat and screen share.
- [Zoom Acceptable Use Guidelines](#) apply to Zoom meetings, and the teacher retains the right to terminate a meeting or a specific student's attendance in the event a violation of the above has occurred.
- Students must adhere to the Internet/Computer System Acceptable Use Policy as outlined above.

### **Student Freedom of Speech / Expression**

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

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

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

### **Civility Policy**

School personnel, parents, guardians, and students are required to be civil in all of their interpersonal school-related interactions. Civility does not require unqualified agreement or

conformity of opinion. An expression of disagreement or a discussion of a controversial viewpoint is not uncivil if such expression or discussion is appropriately and respectfully presented and does not disrupt a school-related activity.

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

Examples of uncivil conduct include\, but are not limited to:

- a. Using an inappropriately loud voice;
- b. Using profane, vulgar, or obscene words, gestures and/or online language/images;
- c. Belittling, jeering, or taunting;
- d. Using personal epithets;
- e. Using violent or aggressive gestures or body-language;
- f. Repeatedly and inappropriately interrupting another speaker;
- g. Repeatedly demanding personal attention at inappropriate times;
- h. Purposefully and inappropriately invading personal space;
- i. Purposefully ignoring appropriate communications;
- j. Wrongfully interfering with another person's freedom of movement;
- k. Wrongfully invading another person's private possessions; or;
- l. Any other behavior that inappropriately disrupts school-related activities.

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

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

## Bullying

Excel Academy recognizes the harmful effects of bullying, hazing, or other behavior that infringes on the safety and well-being of students or interferes with learning or teaching. We desire to provide a safe school culture that protects all students from physical and emotional

harm. Student safety is a top priority, and the school will not tolerate discrimination, harassment, intimidation, or bullying of any kind of any student.

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

- Placing a reasonable pupil or pupils in fear of harm to that pupil’s or those pupils’ person or property.
- Causing a reasonable pupil to experience a substantially detrimental effect on his or her physical or behavioral health.
- Causing a reasonable pupil to experience substantial interference with his or her academic performance.
- Causing a reasonable pupil to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by a school.

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

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

### **Academic Integrity Policy**

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

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

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

## Definition of Plagiarism

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

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

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

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

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

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

### First incident:

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

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

### Second incident:

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

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

### Third incident:

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

- The ToR will confirm the student plagiarized or has been academically dishonest.
- A meeting with the ToR, parent, and school administration will be scheduled.
- The student may be subject to discipline in accordance with applicable due process provisions in accordance with the Handbook, which is available upon request.
- A meeting with the ToR, parent, and school administration will be scheduled to explain the severity of the issue, to provide additional support, and to warn student that they are in jeopardy of being involuntarily withdrawn from the school.

- The student will be issued a BIP if this is a third occurrence of either plagiarism or academic dishonesty and
  - Students in grades TK-6: These offenses will be dealt with on a case-by-case manner.
  - Students in 7th and 8th grade: MTSS supports will be required and individualized based on the student's curriculum and needs.
  - Student in high school: These students will be removed from the course and will receive an F in the course; if a student earns an F in a course that is required for graduation, then they will be required to repeat this course for credit.

## **Process for Addressing Incidents of Inappropriate AI Usage**

### **First incident:**

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

The student will receive a warning.

The family will be notified of the warning.

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

### **Second incident:**

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

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

### **Third incident:**

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

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

#### **Fourth incident:**

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

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

#### **Grievance Procedure**

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

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

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

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



## Special Education Students

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

## Excel Academy's Parent Proctoring Policy

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

### Cheating (Definitions of Cheating)

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

### Testing Dishonesty in Grades TK - 6

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

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

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

- Use of a calculator when not allowed
- Use of "open-book" testing when not allowed

- Using the internet to find answers
- Use of a dictionary or thesaurus
- Use of teacher manuals or answer keys - if a student's entire test is identical to the answer key, and zero work is shown, the student may be asked to retake the test.
- Providing hints or clues to the correct answer
- Copying, recording, or taking screenshots of any part of an assessment for future reference
- Sharing or making any part of the assessment public

### **Accommodations for Students with IEPs or 504 Plans**

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

### **Consequences of Non-compliance**

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

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

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

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

## **Substance Abuse**

Excel Academy does not tolerate the illegal use, possession, or sale of drugs, alcohol, tobacco, or related paraphernalia by students while engaged in school-sponsored educational activities or events. School staff are required to take immediate action to prevent, discourage, and eliminate the illegal use, possession, or sale of drugs, alcohol, tobacco, or related paraphernalia while engaged in school-sponsored educational activities or events. Students found in violation will receive a BIP and are subject to discipline, up to and including suspension and/or expulsion.

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

## **Child Abuse Reporting**

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

## **Homicide Threat Reporting**

The new statutes require any school district employee interacting with students in grades 6 through 12, inclusive, who observes a threat or perceived threat that a student is going to “commit a homicidal act related to school or school activity” to immediately report such threat to local law enforcement. (Ed. Code, § 49393.) Any report of a homicidal threat must include any evidence associated with the threat or perceived threat. If two or more school employees observe the same concerning conduct, a report by one of the employees is sufficient to meet the obligation of all of the employees.

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

If local law enforcement is notified of any threat or perceived threat, SB 906 requires the law enforcement agency or 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 parents “information related to the safe storage of firearms” in the required annual notification, which means an LEA’s first disclosure would be required in the upcoming 2023-2024 school year. We recommend the notice be included in a district’s Parent/Student Handbook. (Ed. Code § 49392.)

## **Independent Study Policy**

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

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

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

- ii. The completion of assignments, assessments or other indicators that evidence that the pupil is working on assignments.
- iii. Learning required concepts as determined by the supervising teacher.
- iv. Progress toward successful completion of the course of study or the individual course, as determined by the supervising teacher.

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

3. The Charter School shall provide content aligned to grade level standards that is substantially equivalent to in-person instruction. For high school grade levels this shall include access to all courses offered by the Charter School for graduation requirements.

- a. For college-bound students, all 15 required courses as determined by the UC or CSU as creditable under the A-G admissions criteria are accessible.
- b. For diploma-bound students, all core courses provide access to A-G approved content in addition to meeting graduation requirements.

4. The Charter School has adopted tiered reengagement strategies for the following:

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

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

Verification of current contact information for each enrolled pupil;

- A. Notification to parents or guardians lack of participation within one school day of the recording of a non-attendance day or lack of participation;
- B. A plan for outreach from the school to determine pupil needs including connection with health and social services as necessary;
- C. A clear standard for requiring a pupil-parent-educator conference to review a pupil's written agreement, and reconsider the independent study program's impact on the pupil's achievement and well-being, consistent with the policies adopted pursuant to paragraph (4) of subdivision (g) of Education Code Section 51747.
- D. An Attendance Intervention Meeting (AIM) will be held once a student receives a second Progress Improvement Notification (PIN) to determine if it is in the best interest

of the student to remain in independent study. The meeting shall include a review of the pupil's written master agreement, and reconsideration of the independent study program's impact on the pupil's achievement and well-being. If the student and parent/guardian elect to stay enrolled, the team will develop an agreement to help support the student to make satisfactory educational progress, including additional resources and supports.

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

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

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

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

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

- a. The manner, time, frequency, and place for submitting a student's assignments, for reporting the student's academic progress, and for communicating with a

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

having responsibility for the special education programming of the pupil, as applicable. Beginning in the 2022–23 school year, for a pupil participating in an independent study program that is scheduled for less than 15 school days, each written agreement shall be signed within 10 school days of the commencement of the first day of the pupil’s enrollment in independent study, by the pupil, the pupil’s parent, legal guardian, or caregiver, if the pupil is less than 18 years of age, the certificated employee who has been designated as having responsibility for the general supervision of independent study, and the certificated employee designated as having responsibility for the special education programming of the pupil, as applicable. For purposes of this paragraph “caregiver” means a person who has met the requirements of Part 1.5 (commencing with Section 6550) of Division 11 of the Family Code.

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

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

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

## **Travel Plan**

A Travel Plan is needed for any travel longer than 2 weeks (10 school days) outside of the counties we serve. EACS serves students who reside in the following counties: Los Angeles, Kern, San Bernardino, Riverside, Orange, and San Diego counties.

- Make your request to your Teacher of Record 2 weeks (10 school days) prior to the travel period
- Your ToR or Teacher will seek approval from the Principal
- During travel time, a student must be attending school and the parent/guardian must be available by phone and/or internet for communication during Excel Academy’s operating hours.



- Students cannot be on extended travel longer than four consecutive weeks per semester (30 consecutive days).

### **Required Courses for TK-8**

- Language Arts
- Mathematics
- Social Studies
- Science
- Physical Education (PE)

### **Optional Opportunities for 7-8 Courses**

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

### **Curriculum and Education Resources**

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

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

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

## California Content Standards

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

ToRs will provide a copy of the grade-level content standards for all students enrolled.

Additionally, parents can obtain the subject and course standards directly from the [California Department of Education](#) website.

## Observation of Student Educational Activities

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

## PE Requirements

The physical education requirements are:

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

Students in grades TK-12 may log their physical activities for each LP on a PE log.

### 7-12 Grade PE Grading

200-160 minutes - A

159-120 minutes - B

119-80 minutes - C

99-40 minutes - D

39-0 minutes - F

## CHYA-California Healthy Youth Act

The California Healthy Youth Act, commonly known as CHYA, is a mandate that requires public schools in the state of California to offer medically accurate, comprehensive sexual health education, and HIV prevention to students once in junior high and once again in high school.

For more information on CHYA, please go to: <https://www.cde.ca.gov/ls/he/se/index.asp>.

Materials are available for review upon request.

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

## Student Athletes

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

- All student athletes must have approved grade appropriate curriculum and all necessary materials for each registered course.
- Junior high students must be registered for at least 4 academic courses
- High school students must be registered for at least 5-6 academic courses depending on graduation credits needed and subject requirements fulfilled. For students interested in pursuing an NCAA pathway, please see below for requirements.

### All students must:

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

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

## Personalized Junior High - 7-8

- **New ToR:** Students will be assigned to a teacher with training in our secondary education model. This ToR will be able to offer curriculum advice, academic support, graduation guidance, and answer college and career related questions.
- **School Counselor:** Our secondary school counselors are a wealth of knowledge about junior high and high school planning and are available for social-emotional support.. Check out the [Excel Academy Counseling](#) website for more information.
- **Advanced options:** High school-level math and world language courses are available for qualified students, which gives your student high school credit, a competitive advantage for college applications, and the opportunity to earn the State Seal of Biliteracy in high school. Details below under High School Advanced courses.
- **JH Honors courses:** All core subjects including Math, Language Arts, Science, and Social Studies may be taken at the honors level with additional, rigorous course projects required.
- **Math Intervention classes:** Students in WIN program have specialized, live math classes dedicated to bringing students to grade-level before entering high school math classes.
- **Excel Teacher-Led Classes:** 7th-12th grade students can enroll in our hybrid, twice-weekly teacher-taught classes to support their independent study education.
- **Electives:** Students can add an additional class to their schedule: Student Leadership or Visuals Arts.
- **Junior National Honor Society:** After the first semester, students who are actively involved in their community through volunteer service and who maintain a GPA of 3.5 or higher can be recommended by their teacher for the Junior National Honor Society.
- **7/8 Homeroom Class:** 7th-8th grade students can enroll in a weekly homeroom class to connect with other junior high students. Class will focus on connection and belonging and how to best navigate junior high.
- **Academic Integrity Training:** All students will learn how to research and use online resources with integrity. Students will sign a Plagiarism Academic Honesty Pact.

## Virtual Pathway

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

All students enrolled in the Virtual Pathway will be issued a school Chromebook. The Chromebook must be accessed using the student's school gmail account. Students are not

permitted to use a personal computer or tablet to join a class session. Should the Chromebook stop working, please notify the school immediately, so that a replacement can be issued as soon as possible. Students are responsible for treating all school-issued technology with care and may be required to pay for any technology that is damaged.

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

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

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

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

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

Additionally, parents/guardians should:

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

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

### **Curriculum Access Using BUZZ**

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

[User Manual-Student](#)

[User Manual-Parent/Observers](#)

### **Virtual Classroom Access**

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

## High School - 9-12

Excel Academy offers a personalized approach to learning where parents are encouraged and supported in choosing pre-vetted curricula from the high school menus or catalog that matches their students' needs, expectations, and rigor in each subject area. With guidance and support from the ToR and the High School Department, students will access college preparatory coursework. Every high school student will have the opportunity to choose an A.C.E. pathway for college and career readiness. Click on [HS Curriculum Catalog](#) to view curriculum classes and choices.

### High School Students Admitted 10 days After the School Year Started

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

### Minimum & Maximum Course Policy

The minimum & maximum course policy is in place to ensure academic success.

- The minimum number of courses that high school students can register for is 5-6 courses per semester depending on the student's respective grade level (see graduation track options below for details).
- 12th graders who have earned 180 credits and on track to graduate 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 enrolled in an approved college course for dual enrollment, then a minimum of 4-5 Excel Academy high school-level courses must be taken each semester they are registered for a college course.
- The maximum number of courses high school students can register for is 8 courses per semester including dual enrollment courses.

### Adding/Changing/Dropping Courses

Students adding or dropping a course can 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 8, 2025

Spring Semester - February 2, 2026

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 October 24, 2025 for fall semester or March 20, 2026 for spring semester will receive an “F” on the report card/transcript.

Withdrawals may only be issued to students who hold a minimum of six courses prior to the withdrawal and wherein the drop will not impact graduation requirements. Seniors carrying five courses may drop to a minimum of four courses as long as they carry sufficient credits to graduate.

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

### **Transcripts**

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

### **Transcript Revision Requests**

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

### **Repeated Courses**

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

## **Graduation Requirements**

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

English - 40 credits

Math - 20 credits

Science - 20 credits (1 life/1 physical)

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

VAPA/World Language/CTE - 10 credits

PE - 20 credits

Ethnic Studies - 5 credits

Electives - 75 credits

Total to graduate: 220 credits

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



### Graduation Track Options

College Prep Track (UC, CSU, Private) <a href="#">CSU Admissions</a> <a href="#">UC Admissions</a>	Customized Graduation Track (Career, Community College, Military, Trade School)
<b>Freshman Year</b>	<b>Freshman Year</b>
English 9                                10 credits	English 9                                10 credits
Algebra 1 or Geometry               10 credits	Pre-Algebra or Algebra 1           10 credits
Biology                                   10 credits	Life Science                             10 credits
World Language year 1               10 credits	Elective                                 10 credits
Physical Education                    10 credits	Physical Education                    10 credits
<b>Minimum 50 Credits</b>	<b>Minimum 50 Credits</b>
<b>Sophomore Year</b>	<b>Sophomore Year</b>
English 10                               10 credits	English 10                               10 credits
Geometry or Algebra II               10 credits	Algebra I or Geometry               10 credits
World History                          10 credits	Physical Science                       10 credits
World Language year 2               10 credits	Physical Education                    10 credits
Chemistry                               10 credits	World History                          10 credits
Physical Education                    10 credits	Elective                                 10 credits
<b>Minimum 60 Credits</b>	<b>Minimum 60 Credits</b>
<b>Junior Year</b>	<b>Junior Year</b>
English 11                               10 credits	English 11                               10 credits
Algebra II or Pre-Calculus/Trig    10 credits	World Language/VAPA/CTE        10 credits
World Language year 3               10 credits	U.S. History                             10 credits
VAPA                                      10 credits	Elective                                 10 credits
US History                               10 credits	Elective                                 10 credits
Physics or Env. Science               10 credits	Elective                                 10 credits
<b>Minimum 60 Credits</b>	<b>Minimum 60 Credits</b>
<b>Senior Year</b>	<b>Senior Year</b>
English 12                               10 credits	English 12                               10 credits
Ethnics Studies                        5 credits	Government                             5 credits
Pre-Calculus or Calculus            10 credits	Economics                             5 credits
Government                             5 credits	Ethnic Studies                         5 credits
Economics                              5 credits	Elective                                 10 credits
Elective                                 10 credits	Elective                                 10 credits
Elective                                 5 credits	Elective                                 5 credits
<b>Minimum 50 Credits</b>	<b>Minimum 50 Credits</b>

Elective

5 credits

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

## Honors and Awards

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

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

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

Excel Academy recognizes graduates in the following ways:

### **National Honor Society:**

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

### **Golden State Merit:**

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

### **Presidential Awards:**

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

### **State Seal of Biliteracy:**

Per the CDE: The State Seal of Biliteracy (SSB), marked by a gold seal on the diploma or transcript, recognizes high school graduates who have attained a high level of proficiency in

speaking, reading, and writing one or more languages in addition to English. Students who meet this requirement will be recognized during the graduation ceremony.

## College Prep/A-G Explained

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

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

## Advanced Course Designation

Below are the eligibility requirements for all advanced course options:

- Student must have a minimum 3.0 GPA for core college courses, 2.7 GPA for college elective courses, and an 85% earned in prior math courses.
- Student must show advanced course readiness in their respective core courses and assessments (such as CAASPP, iReady, Excel Academy assessments, GPA, and report-card grade in respective subject)
- ToR recommendation with guided rubric (community provider & online provider recommendations may also be submitted for consideration).

## Honors Courses

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

- Student requests to register for an honors course
- ToR completes Survey for Advanced Courses
- The Secondary Department will review each request to verify eligibility.
- If approved, all honors courses require a quarterly project
- ToR will assist students in meeting additional honors requirements
- Honors credit will not be issued retroactively post the 10-day add/drop window
- Up to 8 year-long high school courses will be eligible for a full-grade percentage bump per course that earns a passing score. GPA bumps will not be issued for honors courses beyond 8 classes, but students may enroll in additional honors courses for the academic challenge.
- Per the a-g guidelines, only Precalculus and Calculus are eligible for honors credit.
- Transcripts from the online provider may be required to receive credit.

## Advanced Placement (AP) Courses

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

- Student requests to register for an Advanced Placement course
- ToR completes Survey for Advanced Courses
- High School Department will review each request to verify eligibility
- **Excel Academy is not an AP exam testing site.** Excel Academy high school students who wish to take an AP exam must go through their local public high school or visit [collegeboard.org](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.
- Up to 8 year-long courses will be eligible for a full-grade percentage bump per course that earns a passing score. GPA bumps will not be issued for honors courses beyond 8 classes, but students may enroll in additional AP courses for the academic challenge.
- Transcripts from the online provider may be required to receive credit.

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

## Additional Advanced Course Options

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

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

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

### **Junior High Students Taking High School Courses**

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

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

The expectation is that students complete math 6, 7, and 8 coursework before enrolling in Algebra 1. If a student requests to take PreAlgebra in 7th grade without having completed math 7, then the following prerequisites will be required in order to be eligible to apply to enroll in Algebra 1 in 8th grade:

This additional coursework will ensure that all math 6/7/8 standards are covered prior to Algebra 1. These packets must be completed prior to enrolling in Algebra 1.

[Here](#) is the Math 7 Spring/Summer Packet for the students taking Pre-Algebra as 7th Graders in the Fall.

[Here](#) is the answer key that we might want to add to the shared drive.

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

And at least one of the following:

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

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

- Student earns a "meets standards" on their CAASPP ELA for the respective year requested.
- Student earns an 85% or higher in English on their report card.
- Student completes a junior high LOTE course with an 85% or higher.
- Student demonstrates fluency in reading or writing in a LOTE.
- Student receives a recommendation which utilizes a combination of a cognitive and soft skill evaluation from their Teacher of Record or former teacher.

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

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

- Student requests to take high school math and/or world language course/s with their ToR
- ToR completes the Survey for Advanced Courses
- High School Department will review each request to verify eligibility
- If approved, the high school course(s) will be overseen by the High School Department
- The course(s) will be indicated on the Master Agreement for credits, not weeks
- If a student wishes to take an honors-level math and/or world language course, in addition to requesting approval for the core course, they must also request for the honors designation. Please refer to the above honors request process. Upon approval for an honors-level math and/or world language course, students must follow Excel Academy honors requirements for this designation. The GPA will not be weighted because these courses do not count toward graduation credits
- Course/s must be approved by the High School Administration. Junior high school students will have to follow the same add/drop policies as high school students (see above policies).

- Transfer junior high students must show proof of current course enrollment from their previous school via their transcript in order to maintain a high school-level course approval.
- *Per the [CA Dept. of Education](#), junior high students who take Algebra 1 or higher math s are still required to complete courses for the CA graduation requirement the high school math while in grades 9th-12th. Thus, high school-level courses taken in junior high will give students additional graduation credit (5 per semester) but will not help clear a graduation requirement in math. Every high school student is required to complete at least two years of high school math. Grades earned will not count towards the high school GPA. World Language courses taken in 7th and/or 8th grade will help clear the LOTE/VAPA/CTE graduation requirement. These grades earned will not count towards the high school GPA.*

## College Readiness

### Community College Courses - Concurrent Enrollment Policy

Students may request concurrent enrollment courses by following these steps:

1. Students and parents/guardians discuss concurrent enrollment options with their ToR.
2. ToR will discuss eligibility requirements which include the following: Students must have a minimum 3.0 GPA for academic courses or a 2.7 GPA for elective/vocational courses. Students must show college readiness in their respective core courses (ie. each community college sets their own prerequisites for determining high-school eligibility). Students must be enrolled with Excel Academy at least one full semester prior to receiving approval to enroll in a concurrent enrollment course. For any incoming student who demonstrates prior success in a college course, approval to enroll in a concurrent enrollment course will be reviewed.
3. School Counselors will only approve college-level courses which are defined as courses that will earn college credit and are either UC/CSU transferable or applicable to earning an Associate's degree or higher. Courses not receiving credit will not be approved.
4. Classes typically taken by underclassmen (freshman and sophomores) may not be substituted with a college course. These courses include, but are not limited to: Biology, Chemistry, English 9, English 10, Algebra 1, Algebra 2 and Geometry. These classes are foundational to college-level courses of the same names.
5. ToR completes Concurrent Enrollment Course Survey.
6. The High School Department either grants or denies approval for a student to take the requested community college course.
7. 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.

8. Junior high (7th-8th) students interested in taking community college courses are limited to world language. Please see the [Community College Handbook](#) for grade-level policy per community college.
9. 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.
10. It is the responsibility of each student to take this signed form back to their respective community college to submit and finalize registration.
11. 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.
12. 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 requested, students must complete and submit an additional concurrent enrollment form to reinitiate the process.
13. Students must be aware and adhere to all college rules and regulations.
14. In order to confirm the course will transfer to the university of the student's choice, please consult with a Community College Counselor.
15. Per the Community College regulations, only 5% of Excel Academy students can attend a community college during the summer. Priority approval will be given to those needing courses to graduate.
16. 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. 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 pre-approved 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 pre-approved college course, students are required to send an **official transcript** to the Excel Academy Registrar's office. Upon receipt, the high school transcript will be updated to reflect grades/credits earned. Please send all transcript requests to:

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

## College Unit Conversion Policy

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

- 3-5 unit degree applicable (UC/CSU transferable) college courses = 10 high school credits
- Most PE courses have been excluded or restricted for concurrently enrolled students, but a 1 unit course such as Dance, if approved by the college would = 5 high school PE credits
- Some college policies state that their world language course content is equivalent to two years of high school world language; so, a maximum of 20 high school credits will be given per community college course - one year equivalency = 10 credits and two years equivalency = 20 credits. These additional credits only apply to world language courses.
- College-level courses will receive a corresponding GPA bump up to eight respective courses on their transcript.
- College courses taken in excess of the minimum Excel Academy graduation credit requirements of 220 credits may not be issued dual enrollment credit. They will receive college credit but may not receive the additional high school credit.
- For a list of community colleges, see our [Community College Handbook](#).

## Career Readiness

### CTE - Career and Technical Education

Excel Academy offers Career Technical Education (CTE) which provides college preparation and career training for high school students. Career and Technical Education (CTE) is a series of high-school elective courses that provide students with opportunities to explore career pathways and experience hands-on training and education in career fields/sectors that interest them. Students learn workplace competencies that help make academic content more accessible. Each pathway is a two-year program that consists of a concentrator and a capstone course. Students who complete both courses in order with a C or higher in all four semesters will receive “CTE Completer” recognition on their transcript and at graduation.

- See the [High School Curriculum catalog](#) for the current list of CTE pathways and curriculum options.

## College Entrance Exam Information

### PSAT/NMSQT

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

### SAT/ACT

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

## NCAA - National Collegiate Athletic Association

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

11th-grade student-athletes who are considering playing sports at the college level - If you have aspirations of competing in NCAA-affiliated sports, it's crucial that you **register with the NCAA Eligibility Center portal**. This is a mandatory step to determine your academic and amateur eligibility.

**Division 1 Course requirements:**

Complete 16 core courses with NCAA approved curriculum

English - 4 years

Math - 3 years

Science - 2 years

Choose English, math, or science - 1 year

History - 2 years

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

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

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

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

## Grading

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

- Online course - the grade will be issued by the online instructor.
- Excel Teacher Led course - the grade will be issued by the Excel teacher.
- Customized course - the grade will be issued by the ToR with collaboration among parent, ToR, and HQT.
- Community College course - the grade will be issued by the college instructor.
- Students taking online classes or classes with an approved CCP need to consult with the online teacher or instructor regarding questions about grades, averages, or course progress. Excel Academy uses a traditional 4.0 scale in determining Grade Point Average (GPA). Credit is only granted for courses that earn a minimum of 60% out of a possible 100%.
- Excel Academy High School Department reserves the right to review final grades with the exception of any non-Excel Academy issued transcript.
- Excel Academy uses a letter-grading system which does not include any Pass/No Pass grades.

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

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

weeks of receiving the formal challenge

### **High School Prerequisites**

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

### **How to Clear a Prerequisite**

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

- Complete the required prerequisite course(s) at Excel Academy with a satisfactory grade that is a grade of “A,” “B,” “C,” or “D” respectively. Some prerequisite courses must maintain a grade of a B or higher to qualify for the subsequent course.
- Students must present transcripts from another high school, if applicable, to the School Counselor for a transcript review as soon as possible.
- Transcripts must demonstrate satisfactory completion of the prerequisite course; completion of the course with a grade of “A,” “B,” “C,” “D,” or “P” respectively.
- It is at the school’s discretion to accept or deny the request to waive the prerequisite course requirement.

### **Transferable Grades and Credits**

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

#### **Transfer Grades**

Excel will accept transfer grades from students who transfer mid term. If a student is given a percentage grade upon exiting their previous school, Excel Academy may award the transfer grade by applying the percentage to the amount of work equivalent to what was completed at the previous school and require the student to complete the remaining course requirements. Students who are provided with letter grades without percentages will be awarded a transfer

grade equivalent to the amount of work completed at the previous school in accordance with the following scale:

Any A: 99%

Any B: 89%

Any C: 79%

Any D: 69%

Any F: 59%

### Credits

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

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

## **Physical Education for the High School Student**

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

High school students are required:

1. To complete 400 minutes of PE every 10 school days (approximately 40 minutes per day).

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

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

## High School Acceptable and Required Sample Requirements:

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

Here are some suggestions for acceptable samples:

- A unit test - strongly prefer that it comes from the publisher or course. All assessments must demonstrate high school-level rigor.
- A final draft multi-paragraph essay or paper on a related topic. Paper must follow MLA formatting rules. Papers/essays are required twice a semester.
- A rough draft of an in-progress paper - a final draft is always preferred and cannot use final draft for future sample.
- A lab write-up (science courses only) - must include title, intro/purpose, materials list, method, data, results, analysis, conclusion, and graphs or figures, if applicable. Refer to the [Lab Report Template](#). Labs are required twice a semester.
- A project/presentation showing significant learning and application
- A book report with critical analysis - may not be simple summary
- A written copy of a student-written speech or an oral presentation
- Answers to a section of chapter questions or a chapter review
- A timeline or map that clearly reflects HS level work/detail
- Another high school-level sample as agreed upon by ToR/parent/student in advance

## Required Samples:

English and science courses require quarterly essays and labs. ToRs will share the quarterly schedule.

## Driver's Education

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

## Diploma

Students will have the opportunity to display a legal name or a preferred name on a diploma using the intent to graduate form. The school considers the diploma to be a ceremonial

document, and thus you may enter a familiar or preferred name to be used in lieu of your name of record for this purpose. However, please be advised that in some situations your diploma may need to be used as a legal document, and the name appearing on your diploma may need to match other legal documents you possess. For further information on this, contact the school Registrar.

Speak with your school Counselor if you have questions about the high school equivalency exams. If a student completes high school via examination, then they will not be eligible to participate in the high-school graduation ceremony, nor will they receive a diploma.

### **State Seal of Biliteracy:**

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

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

1. Complete all English language arts requirements for graduation with an overall grade point average of 3.0 or above in those classes.
2. Pass the California standards assessment at the “standards met” or above in English language arts (ELA) set for native English speakers at the 11th grade.
3. Pass an English AP assessment with a 3 or higher (AP English Language and Composition or AP English Literature and Composition, or AP Seminar).
4. Achieve a score of 480 or above on the Evidence-Based Reading and Writing section of the SAT.
5. Pass an English IB examination with a score of 4 or higher

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

1. Score three or higher on an Advanced Placement (AP) world language examination.
2. Score four or higher on an International Baccalaureate world language examination.
3. Score at the “proficient” level or higher on a school district language examination that, at a minimum, assesses speaking, reading, and writing in a language other than English.



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

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

# Instructional Funds and Content and Community Provider (CCP) Policies

Excel Academy Charter School maintains a list of approved Community Content and Providers (CCPs) who offer a variety of educational products and services to our enrolled families. Both currently enrolled parents/guardians and Teachers of Record (ToRs) may request the addition of new community providers for consideration. **Excel Academy does not accept unsolicited provider solicitations.**

All prospective CCPs must complete the required **CCP application process**. Providers offering **direct services to students** must also complete a Live Scan fingerprint background check and provide proof of commercial liability insurance. These requirements are mandatory safeguards to ensure the safety and security of our students.

*If a provider chooses not to complete all parts of the application, including the fingerprint background check and insurance verification, their application **cannot be approved.***

Families enrolled at Excel Academy are granted access to the approved CCP list through their assigned Teacher of Record.

## Instructional Funds (IF) Use

Instructional Funds (IFs) are distributed **at the discretion of the Teacher of Record and the Business Services Department** and may only be used with approved CCPs.

### Important Notes:

- IFs depreciate daily based on the student's enrollment date.
- IFs must be used **within the same academic year** they are issued.
- All purchases must align with the student's educational needs, age, and grade level.

## Types of Community Providers

### **Educational Material CCPs**

These providers offer curriculum, books, educational supplies, and materials. Items must be educational in nature, appropriate to the student's needs, and basic in quality.

### **Educational Service CCPs**

These providers offer direct educational services, such as academic tutoring, supplemental academic classes, art/music lessons, or physical education classes.

Learning center classes are supplemental to approved, assigned curriculum.

**Important:** Submitting a service order request does not guarantee placement. Families are responsible for confirming class availability directly with the CCP.

### **Purchasing and Payment Policies**

- **All purchase orders must be created and approved prior to using any services or receiving any materials.**
- **Excel Academy does not reimburse families directly** under any circumstances.
- If a CCP's agreement with Excel Academy has expired or been dissolved, **the school cannot authorize payment** for any services or materials provided after the expiration date.
- Families will be promptly notified by their ToR if an order involves an inactive CCP.

### **Additional Documents for Parent Use**

- [Parent Training: How to place an order](#)

### **Find a CCP Near Your Home**

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

To use this map follow the simple steps below:

- Enter your search criteria into the appropriate box.
- The list will be populated based on your entry.

### **Instructional Funds (IFs)**

Excel Academy allocates **Instructional Funds (IFs)** to each enrolled student based on grade level, educational path, and date of enrollment. These funds allow families to select approved educational materials and services to support their students' academic program.

- **Depending on the student's grade level and enrollment date, between \$3,400 and \$3,900 will be allotted per student.**

## Instructional Fund Amounts

### Personalized Path

- **TK–8th Grade:** \$3,400
- **High School (9–12th Grade):** \$3,900

### Disbursement Schedule:

- TK–8th Grade: \$1,800 in August, \$1,600 in December
- High School: \$1,950 in August, \$1,950 in December

### Virtual Pathway

- **K–8th Grade:** \$2,000

### Disbursement Schedule:

- K–8th Grade: \$1,000 in August, \$1,000 in November

**\*\*Important Note:** IFs are distributed in multiple allotments to allow for flexibility across the academic year. Families are encouraged to plan carefully to ensure funds are utilized effectively.

## Criteria for Materials That Can Be Purchased with IFs

Excel Academy Charter School receives funding from the State of California to support student learning and academic progress toward state standards. As such, **Instructional Funds (IFs) must be used exclusively for educational purposes** and must align with the criteria outlined below.

Teachers of Record (ToRs) will collaborate with the Business Services Manager for clarification on acceptable purchases as needed.

**Please note:** This list is not exhaustive. Excel Academy reserves the right to interpret these guidelines and to make final decisions regarding the appropriate use of IFs.

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### General Criteria:

- Educational curriculum must be appropriate for the student's assigned courses and documented learning plan.
- All purchased materials must support the student's progress toward meeting **state standards** and **school academic requirements**.
- All instructional materials must be **non-sectarian** (non-religious).
- Families must select **basic and economical models** of items when available.  
\*If a higher-priced, specialized item is necessary, a justification statement from the ToR may be required to approve the purchase.
- School and office supplies necessary for learning basic academic skills (e.g., paper, pencils, binders) are allowable.
- Materials purchased for a **documented educational project** are permitted (e.g., fabric, wool, yarn for one project only).  
*\*Exception: Food purchases are not allowed.*
- Educational software may be purchased if it is used to instruct or enhance learning in a specific subject area.
- Materials must not create a risk of **danger or serious injury** for students or staff.
- Certain items may require the submission of **tracking forms** and/or **educational plans** for approval.
- Participation in **school-sponsored field trips** may be covered by IFs.
- **Transfers between sibling instructional funds are not permitted under any circumstances.**
- 

### Specific Item Limits:

- No more than **two (2) black printer ink cartridges** and **one (1) color ink cartridge** may be purchased per semester.
- A maximum of **3 reams of paper per semester** per student may be ordered.

**\*\*Important:** All purchases must comply with these guidelines. Non-compliant purchases will be denied, and IFs will not be reimbursed for unauthorized spending.

### Approved Materials:

- Please refer to our ordering guide [here](#) for Acceptable and unacceptable purchases.

### Disallowed Educational Activities

The following activities are examples of services that **cannot** be funded with Instructional Funds (IFs) due to the significant liability risk they pose to the school. Community and Content Providers (CCPs) offering these activities or services will not be approved by Excel Academy.

Prohibited activities include, but are not limited to:

- Religious, sectarian, or denominational services or materials
- Scuba diving
- Skydiving
- Water sports involving motorized equipment, such as jet skiing
- Skiing and snowboarding
- Aircraft-related activities of any kind
- Behind-the-wheel driver's education
- Operation of any motorized vehicle
- Indoor trampoline parks
- Extreme sports that expose students to undue risk, including but not limited to:
  - Outdoor rock climbing
  - White water rafting
  - Paragliding

Excel Academy reserves the right to expand or adjust this list as needed to protect the health, safety, and educational focus of all enrolled students.

### Additional Guidelines for Specific Items

Excel Academy can only purchase the type of supplies that could be found in a brick and mortar public school. We are unable to cover the cost of high-priced or premium lessons, classes, or materials. We are able to approve either basic group lessons or a limited number of private lessons, provided they are reasonably priced; however, we cannot approve both in the same month. Please refer to the [Ordering Guideline Website](#) for a detailed list of acceptable and unacceptable items.

## **Sectarian Materials**

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

## **Computer Ordering Policy**

### Technology Options:

At Excel Academy, we recognize technology as a vital educational resource. As part of our commitment to supporting student learning, we offer a variety of technology options available for purchase using Instructional Funds (IFs). Please note that, as with all school-purchased materials, any computers ordered with IFs remain the property of Excel Academy and must be returned upon the student's withdrawal or completion of enrollment.

## **Technology Policies**

- All accessories and software purchased with Instructional Funds must be used exclusively with devices issued by Excel Academy. Excel Academy assumes no liability for accessories or software installed on or used with non-Excel Academy issued devices.
- All Chromebooks provided by Excel Academy are equipped with GoGuardian, a monitoring and filtering system designed to block inappropriate or non-educational internet activity. GoGuardian tracks all student searches and visited websites. As a result, Excel Academy is notified if a student engages in inappropriate or harmful searches. In such cases, the parent or guardian will be contacted and informed of the student's Chromebook activity, as reviewed and determined by the school Principals.
- Please be aware that computers issued by Excel Academy do not come pre-installed with additional software, such as Microsoft Word.
- A list of available technology options can be obtained through the student's Teacher of Record. All computer orders must be placed according to the selections listed on the official computer options document.
- Each student in grades TK–12 is eligible for one computer or tablet. A replacement will only be authorized when the existing device no longer adequately supports the student's participation in the educational program or the completion of assigned work.
- Students who use Excel Academy devices or purchase devices using instructional funds, are responsible for lost and damaged devices. In addition, all devices are the property of Excel Academy and upon request need to be returned regardless of the condition of the device.

## **Return Policy for Materials Content & Community Providers (CCPs)**

An Educational Materials Content and Community Provider (CCP) is a business that supplies curriculum, books, and school-related materials. When placing Educational Materials Request (EMR) orders, parents are encouraged to research carefully and select items thoughtfully. Many CCPs do not accept returns from schools, and any funds used for purchases cannot be credited back to individual student accounts. In cases where a return is permitted, any associated shipping costs will be deducted from the student's account balance.

## **Cancellation Policy**

Once an EMR order has been processed and submitted to the Content and Community Provider (CCP), it cannot be canceled. Once materials are requested, the Business Services Department will proceed with ordering, and cancellations are no longer permitted.

If an order remains in "Pending Status," the Teacher of Record (ToR) may cancel or edit the purchase order in OPS. **However, for VCI orders, the CCP must first be notified and must approve the cancellation before the order can be canceled in OPS.**

To cancel a purchase order that is still pending:

- Locate the purchase order by conducting a search.
- In the status dropdown menu, change the status from "Pending" to "Canceled."
- Click "Update Order" to complete the cancellation.

**Important: If you do not click "Update Order," the cancellation will not be finalized.**

The VCI Cancellation Policy requires that classes be canceled with at least two weeks' notice provided directly to the content and community provider. Any cancellation policies specific to individual content and community providers are solely the parent's responsibility to manage and honor.

## **Backordered Items**

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

## **Ordering Deadline**

**April 10th, 2026** is the deadline for the parents to get PO requests submitted for review. ToRs will submit all approved orders requests no later than April 17, 2026. After the deadline, no purchase orders can be submitted or adjusted. Instructional Funds (IFs) do not carry over from year to year. Any unused funds remaining after the deadline will expire, and parents will no longer have access to them.



# Intervention

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

## **WIN Interventions:**

What I Need (WIN) interventions provide quality instruction & progress monitoring for students who are performing below grade-level standards on local or state assessments. Students with qualifying data are required to choose an intervention from our WIN Menu and meet weekly WIN participation requirements per the Acknowledgement of Responsibilities signed with the Master Agreement. Failure to meet WIN participation expectations for a period of five school days or more may result in a PIN.

## **Small Group Instruction:**

Students will regularly attend required classes as assigned. Failure to attend classes for a period of five school days or more may result in a PIN.

## **Student Success Team (SST)**

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

## **504 Plans**

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

A mental or physical impairment which substantially limits one or more major life activities. The major life activities include, but are not limited to, caring for one's self, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, working, eating, sleeping, standing, lifting, bending, reading, concentrating, thinking, speaking, and/or major bodily functions.

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

**If you have questions regarding 504 Plans, please contact your ToR or the 504 Coordinator, Tamara Murphy [tmurphy@excelacademy.education](mailto:tmurphy@excelacademy.education).**

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

## Special Education

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

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

# Assessments

## Report Cards

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

## Grading Scales

### TK-5 Students

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

**4 - Exemplary:** Student consistently demonstrates an in-depth understanding of the standards, concepts, and skills taught. Student is working above grade-level expectations across ALL domains/standards. Student produces outstanding work with little help or reteaching.

**3 - Proficient:** Student consistently demonstrates an understanding of the standards, concepts, and skills taught. Student is meeting grade-level expectations across the vast majority of domains/standards, 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. Student is working towards grade-level expectations. Student requires several tools, and frequent reteaching to understand concepts being taught. Student is working at a slower pace, and/or works slightly below grade level expectations.

**1 - Non-Proficient:** Student does not yet demonstrate an understanding of the standards, concepts, and skills taught. Student is working far below grade-level expectations. Student has difficulty understanding new concepts. Student is working well below grade level expectations.

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

### **6th - 12th Grade Report Cards - Required**

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

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

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

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

**98 - 100 = A+  
93 - 97 = A  
90 - 92 = A-**

**Consistent performance in achievement beyond the usual requirement.  
Achievement of high quality.  
Credit will be issued for high school courses.**

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

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

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

**70 - 72 = C-**

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

**68 - 69 = D+**

**63 - 67 = D**

**60 - 62 = D-**

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

**59 and below = F**

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

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

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

## **Grades and GPA**

A GPA stands for a student's grade point average. A student's GPA is the total of all high-school course grades earned in high school and is divided by the total number of credits completed. Excel Academy requires students to earn a minimum of a D to pass a class and earn credit toward graduation. A total of 220 credits must be earned in order to graduate high school. Excel Academy reports grades on a 4.0 scale with additional points being given for Honors (grades 10-12), Advanced Placement, and Concurrent Enrollment courses. The academic, Cal Grant, and weighted GPA calculations do not include 9th grade. The Total GPA includes 9th grade.

## **State and Local Assessments**

### **Standardized Testing**

The California Assessment of Student Performance and Progress (CAASPP) is the state-mandated academic testing program. All charter schools are required to administer the

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

There is no law permitting a parent to opt out of the school's internal assessments, and therefore, students are required to participate in all internal/alternative assessments offered. Students who do not participate in the required assessments will be issued a Progress Improvement Notification (PIN) for each missed assessment. Upon the third Progress Improvement Notification, the student is subject to involuntary withdrawal.

Effective in 2022, when students do not participate in CAASPP testing our charter school will suffer significant penalties when reporting the school's performance measurement on the California state dashboard. Students who do not participate in testing will ultimately be assigned the lowest scale score possible which will hinder the overall performance score of the school. Charter Schools who are designated as low performing are subject to non-renewal. Charter schools exist in a performance-based accountability system where they are held accountable for student academic performance. In fact, a charter school cannot continue to exist without collecting data on students' performance on a variety of assessments and indicators. When a charter authorizer or county office of education is evaluating whether to approve and/or renew a school's charter petition, "increases in pupil academic achievement" is the most important factor in the decision. (Ed. Code, §§ 47607(c)(2) , 47607(a)(3)(A).) Therefore, it is important during the revocation and renewal processes for a school to gather as much positive academic achievement data as possible to show progress in student performance. Evaluating graduation, attendance, suspension, and English Learner (EL) reclassification rates are also ways to show student progress. However, student participation and performance on state mandated assessments (CAASPP) is the used method, and results are indicated on the California School Dashboard and System of Support. The CA Dashboard is a powerful online tool to help districts and schools identify strengths and weaknesses and pinpoint student groups that may be struggling (<https://www.cde.ca.gov/ta/ac/cm/>). **Please remember that results and attendance from all state tests are directly tied to school funding per recent LCFF legislation and are an integral part in maintaining partnerships with our chartering school districts. At Excel Academy, our priority is always our students and sustaining longevity in the incredible model we offer to our families.**

If you have any questions, please contact Excel Academy's Director of Operations and Accountability, Jenny Craig at [jcraig@excelacademy.education](mailto:jcraig@excelacademy.education).

### **English Language Proficiency Assessments for California (ELPAC)**

The English Language Proficiency Assessments for California (ELPAC) is aligned with the 2012 California English Language Development Standards. The ELPAC consists of two separate assessments: one for the initial identification of students as English Learners (ELs) and a second for the annual summative assessment to measure a student's progress in learning English and to identify the student's level of English language proficiency (ELP) ([cde.ca.gov](http://cde.ca.gov)).

- Grades K-12
- English Learners only
- Test Administration
  1. Initial Identification - When student enrolls with Excel Academy - Dates and Locations TBD (Assessment will be administered by trained proctors within 30 days of enrollment.)
  2. Annual Summative Assessment - Beginning in the Spring (Assessment will be administered by trained proctors.)
- Results are provided by the California Department of Education and sent to the school. Once received, parents will receive a letter explaining student score reports. Parents may also access test results through the parent portal.
- 

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

### **Criteria for Reclassification to Fluent English Proficient (RFEP)**

In order to be reclassified to fluent English proficient (RFEP) and exit the EL program, students must meet the following criteria:

- Minimum ELPAC overall score of 4
- Teacher Evaluation
- Parent Approval
- CAASPP - Smarter Balanced and/or Local Assessments can also be used in determining student readiness for redesignation

### **CAASPP - California Assessment of Student Performance and Progress**

#### **California Science Test (CAST) – Computer Based Assessment**

- The California Science Test (CAST) is an online test based on the California Next Generation Science Standards (NGSS).

- Participation in the CAST is required for all students in grades five and eight and for the pre-selected high school grades.
- All local educational agencies (LEAs) with eligible students in grades five and eight will administer the CAST. LEAs with eligible students in high school (i.e., students in grades ten, eleven, or twelve) will be pre-selected to participate in the spring assessment. The CAST uses the current California Assessment of Student Performance and Progress test delivery system and will only be administered online ([www.caaspp.org](http://www.caaspp.org)).

### **Smarter Balanced Assessment Consortium (SBAC) – Computer-Based Test**

Students are working harder, thinking more critically, and applying their learning to the real world. To measure state standards, educators from states using Smarter tests have worked together to develop 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
- Information for the SBAC ELA/MATH/CAST will be emailed to parents in early spring.
- Technology usage by students is prohibited in the designated testing rooms.
- During testing, cellphones are highly discouraged, and *no* electronic devices are allowed at the test sites, including smart watches.
- If testing in person, parents are notified when students have completed testing by a proctor at the site.
- If testing in person, parents are welcome to stay in the waiting area at most sites, but are not allowed in the testing rooms.
- If testing in person, a Photo ID may be *required* at pick-up.
- If testing in person, siblings picking up students **MUST** be old enough to have a photo ID and must be identified at the time of check-in.
- If testing in person, students may bring water and lunch to testing in a clear bag. Backpacks are not allowed.
- Students will be encouraged to take breaks during testing (i.e. restroom and snack breaks).
- Parents **MUST** review this information with their students.



## Testing Resources

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

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

There are four major types of questions that students may see: multiple choice, multiple response, short answer, and performance assessments. We encourage you to explore and discuss the practice tests with your students. Please note that some of the practice tests do not provide answers or a score; however, it does provide your students with the experience of navigating through a sample test session, which is important to practice.

Additional Resources:

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

### **Physical Fitness Test (PFT)– California**

The PFT provides information that can be used by (1) students to assess and plan personal fitness programs, (2) teachers to design the curriculum for physical education programs, and (3) parents and guardians to understand their children's fitness levels. The program also provides results that are used to monitor changes in the physical fitness of California students. By law (Education Code (EC) Section 60800) public schools are required to administer the PFT annually to all students in grades 5, 7 and 9 ([cde.ca.gov](http://cde.ca.gov)).

- Grades 5, 7, and 9
- Testing takes place in May. Your ToR will provide all necessary information and details regarding testing
- The PFT is administered by ToRs who will provide Excel Academy's Director of Operations and Accountability with the results for each student tested.
- Students with testing accommodations will have them outlined in their IEPs or 504 Plans.
- If a parent states a student needs additional support, the ToR will need to notify the Director of 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

\*The Healthy Fitness Zone standards are available - [FITNESSGRAM CHART](#)

### **i-Ready Benchmark Assessments – Computer-Based Tests**

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

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

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

## TK Assessments

TK students are administered paper pencil benchmark assessments in English language arts and mathematics in the Winter and Spring. The assessments are administered by the students' ToR.

## Reading Difficulties Screener

The Reading Difficulties Screener is a state required assessment that is administered annually to students in K-2 to assess students for risk of reading difficulties, including possible neurological disorders such as dyslexia. The CDE has created a screening list of evidence-based, culturally, linguistically and developmentally appropriate screening options for schools to choose from. K-2 students will be assessed in the Fall using a state approved assessment.

## Student Testing Participation Requirement

All students currently enrolled in Excel Academy are required to participate in the aforementioned tests (where applicable). **Failure to participate or satisfy assessment requirements will result in PINs being issued to the student.** Alternative paper pencil assessments are subject to be given virtually by the ToRs only if in-person meetings/testing sites are not in place. Please refer to Excel Academy's PIN Policy.

## High School Assessments

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

## Field Trips

Excel Academy offers a wide variety of field trips and community events. Field trips may consist of historical reenactments, plays, musicals, libraries, museum tours, and so much more. Excel Academy's Community Engagement Coordinator will be working throughout each school year to provide engaging, interactive, and educational opportunities for students and parents to participate in and around their community. Participation on the part of students and parents is optional. Excel Academy does not provide transportation to and from these events.

Parents/Guardians must be in attendance with their student(s) on Excel Academy field trips and at events, unless noted otherwise. The out-of-pocket parent/non student sibling (not of school age)/student tickets must be paid during registration. If students are using IFs, the amount will be removed at the close of the registration window.

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

### Instructional Funds for Field Trips

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

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

### Refunds

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

# Clubs, Programs, Student, & Parent Opportunities

## **GATE - Gifted and Talented Program**

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

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

GATE testing is provided annually and participation is voluntary.

## **Parent Advisory Committee**

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

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

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

Excel Academy believes that active parent, student, and employee participation in school operations will help foster the sustainability of our school. The PAC will play an important role in making Excel Academy even more responsive to staff, student, and parent needs and

provide for continual improvement. This ensures that Excel Academy staff members practice open and positive communication with families. To that end, we welcome any inquiries into parent participation in the committee. Please use the following link to provide parent feedback: [Click here to complete the PAC feedback form.](#)

### **Student Council**

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

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

## Work Permits

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

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

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

### **General Work Permits:**

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

- Parents may print the B1-1 form (Statement of Intent to Employ a Minor & Request for a Work Permit) from their parent portal.
- Parent/student must complete their sections on the document, and then have the employer complete their section, prior to emailing it to Excel Academy for authorization.
- All parent and employer sections must be completed for Excel Administration to review
- Once the document is completed by the above mentioned parties, student will email it to Excel Academy's Registrar office: registrar@excelacademy.education.

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

### **Entertainment Work Permits:**

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

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

# Outline of Violations that May Result in Involuntary Removal

## Attendance

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

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

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

## Governing Board Policies

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

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

The complete list of all Board-approved policies as well as how to access them may be found at

<https://excelacademy.education/our-board/board-policies>



## Behavior

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

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

## Acknowledgement Of Responsibilities

### I, the student, agree to:

- The terms as outlined in the Master Agreement.
- Complete coursework as outlined in the Master Agreement and as assigned by the credentialed teacher.
- Participate in a full academic school day, with the following average hours as guidelines: TK-K 4-hours/day , Grades 1st -8th 5-hours/day, Grades 9th-12th 6-hours/day.
- Attend all required meetings as scheduled and on-time.
- Have the camera on and show my face in a virtual setting.
- Come prepared to each Learning Period (LP) meeting with the body of work assigned by my Teacher of Record (ToR). The work should be complete and legible, with clear feedback/grades provided.
- Stay on pace to complete my assignments each week. Should I need additional support, I will request it from my ToR.
- Students registered in ETL courses or the Virtual Pathway agree to:
  - Arrive promptly and come prepared each assigned school day to submit or complete assignments as directed by the classroom teacher. Submit work that is always complete and legible.
  - Attend all scheduled classes, conferences, and meetings, and actively participate and engage with participants.
- Complete intervention assignments and requirements (WIN, ELD, etc). Failure to complete intervention assignments and/or requirements for a period of five school days or more may result in a PIN.
- Regularly attend required intervention classes (WIN Live, ELD Live, &/or Essentials courses) as assigned. Failure to attend intervention classes for a period

of five school days or more may result in a PIN.

- Complete all required assessments, including the following: CAASPP (ELA, math, and science), i-Ready Diagnostic Assessments, grade-level paper/pencil benchmark assessments, Physical Fitness Testing (PFT), Initial and Summative ELPAC assessments, Algebra 1 Readiness Assessment (students entering Algebra I only), intervention assessments, and course assessments. Failure to complete required school-wide assessments will result in a PIN.
- Conduct myself in a respectful, responsible, and safe manner at all Excel Academy functions, including virtual forums. I understand that my participation in school functions is a privilege which may be revoked if my behavior is not acceptable.
- Use school-issued technology for school-related learning and assignments only, treating it with care and respect.
- If my behavior does not comply with school expectations, I may receive a Behavior Improvement Plan (BIP).

*\* Please see the Parent Handbook for a description of the Progress Improvement Notification (PIN) process.*

**I, the parent/guardian agree to:**

- Prompt, timely, and effective communication with staff within 48 hours, excluding weekends and school holidays.
- Provide necessary documentation or information to the school in order to record attendance in compliance with applicable law.
- Provide the school with all required documentation for continued enrollment, such as proof of residency.
- Provide Excel Academy with in-progress grades if my student enrolls 25 days or more after the start of the semester and understand that in-progress grades will be combined with grades earned at the previous school to award the final semester grade.  
Request support from my student's assigned ToR when needed.
- Provide Excel Academy with a copy of either an unofficial or official transcript during the registration process. Upon enrollment, an official transcript is required in order to include grades and credits on the Excel Academy high school transcript.
- Provide transportation to my student's scheduled meetings and school assessments.
- Monitor my student's behavior in all school-related classes or activities.
- Ensure my student completes mandated school-wide assessments such as: CAASPP (ELA, math, and science), i-Ready Diagnostic Assessments, grade-level paper/pencil benchmark assessments, PFT, Initial and Summative ELPAC assessments, Algebra 1 Readiness Assessment (students entering Algebra I only), intervention assessments, and course assessments. Failure to complete required school-wide assessments will result in a PIN.

- Support my student in the completion of intervention assignments as required (WIN, ELD, etc). Failure to complete intervention assignments for a period of five school days or more may result in a PIN.
- Ensure regular student attendance in required intervention classes (WIN Live, ELD Live, &/or Essentials courses) as assigned. Failure to attend intervention classes for a period of five school days or more may result in a PIN.
- Conduct myself in a respectful, responsible, and safe manner at all Excel Academy functions. I understand that my participation in school functions is a privilege which may be revoked if my behavior is not acceptable.
- Ensure VCI classes paid with instructional funds take place on instructional days during the current school year.
- Return all school-issued materials upon disenrollment, involuntary withdrawal, or the designated due date. All school purchased materials will be returned to Excel Academy. All materials are the property of Excel Academy and are on loan to the student while enrolled.

#### Personalized Path:

- Be responsible for the daily teaching, monitoring, verification, and assessment of all subjects/courses outlined in the Master Agreement.
- Be responsible for the adequate academic progress of my student as determined by the ToR. If a tutor is needed, the tutor's instruction does not supersede my responsibility for the day-to-day instruction and progress monitoring of my student.
- Attend Learning Period (LP) meetings at a mutually agreed upon location. If a make-up meeting is scheduled, it needs to take place within 5 school days of the original meeting. If this does not occur, a PIN may be issued. Parents/guardians that reschedule more than twice per school year may be subject to a Progress Improvement Notification (PIN).
- Provide the body of work for each subject/course assigned according to the pacing guide and all necessary paperwork.
- Ensure the student's coursework aligns with grade-level standards, If the ToR finds that the student's course of study is missing key content standards and provides additional assignments/curriculum, the parent is responsible to ensure that content is covered.
- Upon request, provide work samples every 5 school days to designated staff.
- High school students or students taking high school-level coursework must actively attempt and complete a minimum of at least 25-30 credits per semester in order to maintain earning sufficient credits toward graduation (20-25 credits at Excel Academy if the student is participating in concurrent enrollment).
- Official transcripts for college courses must be submitted to the Registrar as soon as possible after completing a course in order to receive a high school

grade on the report card and credit on the transcript.

- Junior high students must receive prior approval to enroll in a high school math and/or world language course for high school credit. Credits do not count toward the required credits for graduation.

#### Virtual Path or ETL Classes

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

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

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

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

#### **Progress Improvement Notification Procedures**

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

### **Progress Improvement Notification Policy**

#### First Progress Improvement Notification (PIN)

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

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

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

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

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

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

To determine that independent study is in the best interest of the student, an Attendance Intervention Meeting (AIM) may be held with the school's educational team within five days. The purpose of the AIM will be to review the student's written agreement,

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

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

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

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

#### Third Progress Improvement Notification (PIN) - Internal Evaluation

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

If the student is served under an Individualized Education Plan (IEP) and the Attendance Intervention Meeting (AIM) team concludes that the area identified for improvement in the PIN

may be related to the student's disability, the AIM team will share with the SpED Department to review and determine if an IEP meeting needs to be scheduled in addition to an Attendance Intervention Meeting (AIM).

### **Behavior Improvement Plan (BIP)**

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

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

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

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

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

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

### **Involuntary Withdrawal Policy**

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

## **Procedures**

### **Grounds for Involuntary Withdrawal of Students**

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

### **Withdrawal Procedures**

No student shall be involuntarily withdrawn by the Charter School for any reason unless the parent/guardian of the student has been provided written notice of intent to withdraw the student no less than five (5) school days before the effective date of the action. The written notice shall be in the native language of the student or the student's parent/guardian or, if the student is a foster child or youth or a homeless child or youth, the student's educational rights holder, and shall inform the student, the student's parent/guardian, or educational rights holder of the basis for which the student is being involuntarily withdrawn and the student's parent, guardian, or educational rights holder's right to request a hearing to challenge the involuntary removal. If the student's parent, guardian, or educational rights holder requests a hearing, the student shall remain enrolled and shall not be withdrawn until the Charter School issues a final decision.

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

Unless postponed for good cause, the hearing shall be held within thirty (30) school days after the student has accrued three (3) missed identified assignments, per the Master Agreement and independent study policy.



Written notice of the hearing shall be forwarded to the student and the student's parent/guardian

at least ten (10) calendar days before the date of the hearing. Upon mailing the notice, it shall be deemed served upon the student. The notice shall include:

1. The date and place of the hearing.
2. A statement of the specific facts, charges and violations upon which the proposed withdrawal is based.
3. A copy of the Charter School's policies 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.

### **Written Notice to Withdraw**

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

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

#### 1. Procedural Safeguards/Manifestation Determination

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

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

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

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

- a. Review the student's IEP and determine if the student requires any additional supports, goals, or services to address the behavior(s) in question; and
- b. Return the child to the placement from which the child was withdrawn, unless the parent/guardian and the Charter School agree to a change of placement as part of the modification of the IEP.

The IEP team may also:

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

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

## **Special Education Students – PINs**

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

Change of placement for a current special education student, or eligibility determination for a child suspected of being a student with a disability, will be addressed by the IEP team. No student who is known to have a disability condition will be recommended for removal from the current placement unless 1) a Manifestation Determination IEP meeting is convened according

to law and 2) it is determined at that meeting that the concerns warranting removal are not a manifestation of the student's disability.

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

### **Suspension/Expulsion Procedures**

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

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

### **Family Educational Rights and Privacy Act (FERPA)**

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

1. The right to inspect and review the student's education records within 45 days after the day the school receives a request for access.
2. Parents or eligible students should submit to the program lead/director a written request that identifies the records they wish to inspect. The program lead/director will make arrangements for access and notify the parent or eligible student of the time and place where the records may be inspected.
3. The right to request the amendment of the student's education records that the parent or eligible student believes are inaccurate, misleading, or otherwise in violation of the student's privacy rights under FERPA.
4. Parents or eligible students who wish to ask the school to amend a record should write the program lead/director, clearly identify the part of the record they want changed, and specify why it should be changed. If the school decides not to amend the record as requested by the parent or eligible student, the school will notify the parent or eligible student of the decision and of their right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the parent or eligible student when notified of the right to a hearing.
5. The right to provide written consent before the school discloses personally identifiable information (PII) from the student's education records, except to the extent that FERPA authorizes disclosure without consent.

6. One exception, which permits disclosure without consent, is disclosure to school officials with legitimate educational interests. For this purpose, a school official is a person employed by the school as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel) or a person serving on the school board. A school official also may include a volunteer or contractor outside of the school who performs an institutional service of function for which the school would otherwise use its own employees and who is under the direct control of the school with respect to the use and maintenance of PII from education records, such as an attorney, auditor, medical consultant, or therapist; a parent or student volunteering to serve on an official committee, such as a disciplinary or grievance committee; or a parent, student, or other volunteer assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.
7. The right to file a complaint with the U.S. Department of Education concerning alleged failures by the school to comply with the requirements of FERPA. The name and address of the Office that processes FERPA complaints are:

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

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

- To other school officials, including teachers, within the educational agency or institution whom the school has determined to have legitimate educational interests. This includes contractors, consultants, volunteers, or other parties to whom the school has outsourced institutional services or functions, provided that the conditions listed in §99.31(a)(1)(i)(B)(1) - (a)(1)(i)(B)(2) are met.
- To officials of another school, school system, or institution of postsecondary education where the student seeks or intends to enroll, or where the student is already enrolled if

the disclosure is for purposes related to the student's enrollment or transfer, subject to the requirements of §99.34.

- To authorized representatives of the U.S. Comptroller General, the U.S. Attorney General, the U.S. Secretary of Education, or State and local educational authorities, such as the CDE. Disclosures under this provision may be made, subject to the requirements of §99.35, in connection with an audit or evaluation of Federal- or State-supported education programs, or for the enforcement of or compliance with Federal legal requirements that relate to those programs. These entities may make further disclosures of PII to outside entities that are designated by them as their authorized representatives to conduct any audit, evaluation, or enforcement or compliance activity on their behalf.
- In connection with financial aid for which the student has applied or which the student has received, if the information is necessary to determine eligibility for the aid, determine the amount of the aid, determine the conditions of the aid, or enforce the terms and conditions of the aid.
- To state and local officials or authorities to whom information is specifically allowed to be reported or disclosed by a State statute that concerns the juvenile justice system and the system's ability to effectively serve, prior to adjudication, the student whose records were released, subject to §99.38.
- To organizations conducting studies for, or on behalf of the school, in order to: (a) develop, validate, or administer predictive tests; (b) administer student aid programs; or (c) improve instruction.
- To accrediting organizations to carry out their accrediting functions.
- To parents of an eligible student if the student is a dependent for IRS tax purposes.
- To comply with a judicial order or lawfully issued subpoena.
- To appropriate officials in connection with a health or safety emergency, subject to §99.36.
- Information the school has designated as "directory information" under §99.37.

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

Examples include:

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

Outside organizations include, but are not limited to, companies that manufacture class rings or publish yearbooks. If you do not want the school to disclose any or all of the types of information designated below to outside organizations as directory information from your child's education records without your prior written consent, you must notify the school and "opt out" of the directory.

Any and all of the following items of directory information relating to a student may be released to a designated recipient unless a written request is on file to withhold its release:

- Name
- Address
- Date of birth
- Dates of attendance (e.g., by academic year or semester)
- Current and previous school(s) attended
- Degrees and awards received

In addition, two federal laws require a school receiving assistance under the Elementary and Secondary Education Act of 1965, as amended, to provide military recruiters, upon request, with the following information: names, addresses and telephone listings, unless parents have advised the school that they do not want their student's information disclosed without their prior written consent.

## **Title IX Notice of Nondiscrimination**

Excel Academy is committed to providing an educational and work environment that is free from discrimination and harassment, including discrimination and harassment based on any protected category, and an environment free from retaliation for participation in any protected activity covered by this policy. Excel Academy will ensure equal rights and opportunities in accessing education programs, activities, and facilities and prohibits discrimination or harassment based on the following categories: race, color, religion, religious creed (including religious dress and grooming practices), national origin, ancestry, citizenship, physical or mental disability, medical condition (including cancer and genetic characteristics), genetic information, marital status, sex (including pregnancy, childbirth, breastfeeding, or related medical conditions), gender, gender identity, gender expression, age (40 years and over), sexual orientation, veteran and/or military status, protected medical leaves (requesting or approved for leave under the Family and Medical Leave Act of the California Family Rights Act), domestic violence victim status, political affiliation, and any other status protected by state or federal law. In addition, Excel Academy prohibits retaliation against a person who engages in activities protected under this policy. Reporting, or assisting in reporting, suspected violations of this policy and cooperating in investigations or proceedings arising out of a violation of this policy are protected activities under this policy.

Megan Anderson, Director of Human Resources

1 Technology Ste. i-811, Irvine CA 92618

Ph: 949-387-7822

manderson@excelacademy.education

### **Annual Notice of Uniform Complaint Procedures**

Excel Academy has the primary responsibility for compliance with federal and state laws and regulations for students who attend our schools. We have established Uniform Complaint Procedures (UCP) to address allegations of unlawful discrimination, harassment, intimidation, and bullying, and complaints alleging violation of state or federal laws governing educational programs, the charging of unlawful pupil fees and the non-compliance of our Local Control and Accountability Plan (LCAP).

We will investigate all allegations of unlawful discrimination, harassment, intimidation, or bullying against any protected group as identified in Education Code section 200 and 220 and Government Code section 11135, including any actual or perceived characteristics as set forth in Penal Code section 422.55 or on the basis of a person's association with a person or group with one or more of these actual or perceived characteristics in any program or activity

conducted by the school, which is funded directly by, or that receives or benefits from any state financial assistance. The UCP shall also be used when addressing complaints alleging failure to comply with various other state and/or federal laws.

A pupil enrolled in a public school shall not be required to pay a pupil fee for participation in an educational activity.

A pupil fee includes, but is not limited to, all of the following:

- A fee charged to a pupil as a condition for registering for school or classes, or as a condition for participation in a class or extracurricular activity.
- A security deposit, or other payment, that a pupil is required to make to obtain a lock, locker, book, class apparatus, musical instrument, clothes, or other materials or equipment.
- A purchase that a pupil is required to make to obtain materials, supplies, equipment, or clothes associated with an educational activity.

A pupil fees or LCAP complaint may be filed anonymously if the complainant provides evidence or information leading to evidence to support the complaint.

A pupil fee complaint must be filed with the Community Collaborative Family of Schools no later than one year from the date the alleged violation occurred. A complaint of noncompliance should be filed first with the school lead/director under the Uniform Complaint Procedures. A complainant unsatisfied with the decision of the school lead/director may appeal the decision and shall receive a written appeal decision within 60 days of receipt of the complaint.

Complaints other than issues relating to pupil fees must be filed in writing with the following person designated to receive complaints:

**Megan Anderson, Director of Human Resources**

**1 Technology**

**Suite I-811**

**Irvine, CA 92618**

**Ph: (714) 336-4220**

**manderson@excelacademy.education**

Complaints alleging discrimination, harassment, intimidation, or bullying, must be filed within six (6) months from the date the alleged discrimination, harassment, intimidation, or bullying, occurred or the date the complainant first obtained knowledge of the facts of the alleged



discrimination, harassment, intimidation, or bullying, unless the time for filing is extended by the school administrator or his or her designee.

Complaints will be investigated and a written decision or report will be sent to the complainant within sixty (60) days from the receipt of the complaint. This time period may be extended by written agreement of the complainant. The person responsible for investigating the complaint shall conduct and complete the investigation in accordance with local procedures adopted under 5 C.C.R. § 4621.

The complainant has a right to appeal our decision of complaints regarding specific programs, pupil fees and the LCAP to the CDE by filing a written appeal within 15 days of receiving our decision. The appeal must be accompanied by a copy of the originally-filed complaint and a copy of our decision.

The complainant is advised of civil law remedies, including, but not limited to, injunctions, restraining orders, or other remedies or orders that may be available under state or federal discrimination, harassment, intimidation or bullying laws, if applicable.

A copy of our UCP compliant policies and procedures is available free of charge.

## Parent Liability for Student Conduct

The law states that a parent or guardian of any minor whose willful misconduct results in injury or death to any pupil or any person employed by, or performing volunteer services for a school, or who willfully cuts, defaces, or otherwise injures in any way any property, real or personal, belonging to a school or personal property of any school employee, shall be liable for all damages caused by the minor.

Further, the parent or guardian of a minor shall be liable to a school for all property belonging to the school loaned to the minor and not returned upon demand of an employee of the school authorized to make the demand.

Any school whose real or personal property has been willfully cut, defaced, or otherwise injured, or whose property is loaned to a pupil and willfully not returned upon demand of an employee of the school authorized to make the demand may, after affording the pupil his or her due process rights, withhold grades, diploma, and transcripts of the pupil responsible for the damage until the pupil or the pupil's parent or guardian has paid for the damages thereto. The school will notify the parent or guardian of the pupil's alleged misconduct before withholding the pupil's grades, diploma, or transcript.

If the minor and parent are unable to pay for damages, or to return the property, the school will provide a program of voluntary work for the minor in lieu of the payment of monetary damages. Upon completion of the voluntary work, the grades, diploma, and transcript of the pupil will be released.

# Student Behavioral Health

## Behavioral Health Support at Excel Academy:

- Encourage your student to participate in our school wide Behavioral Wellness Surveys. This guides our behavioral health support offerings through the school year.
- Attend Social Emotional Learning (S.E.L.) groups provided K-12. Contact your ToR for specific dates/times.
- Contact [Care Solace](#), a free, behavioral health care coordination service that can connect you with behavioral health care or substance abuse treatment centers, covered by your insurance or on a sliding scale.

If you have a child who may be struggling with emotions/behavior please reach out to their assigned counselor for additional support.

## School Counselors:

### Elementary (Grades TK-6):

Caroline Forester, [cforester@excelacademy.education](mailto:cforester@excelacademy.education), PH: (619) 786-8270

### Secondary (Grades 7-12):

#### *Residing in Los Angeles, San Bernardino, Kern counties:*

Larissa Allen Jefferson, [lallenjefferson@excelacademy.education](mailto:lallenjefferson@excelacademy.education), PH: (657) 234-7585

#### *Residing in Orange, Riverside, San Diego counties:*

Daniel Favela, [dfavela@excelacademy.education](mailto:dfavela@excelacademy.education), PH: (909) 566-3186

## Suicide Prevention Policy

Please click the link to view:

[Suicide Prevention Policy](#)

Charter schools serving students in grades 7-12 are required to adopt a student suicide prevention policy in consultation with school and community stakeholders and others.

Protecting the health and well-being of all students is of utmost importance to our school. The school board has adopted a suicide prevention policy which will help to protect all students through the following steps:

1. Students will learn about recognizing and responding to warning signs of suicide in friends, using coping skills, using support systems, and seeking help for themselves and friends. At the beginning of each school year, an informational pamphlet will be provided to each student's parent or guardian. It is the responsibility of each student's parent or guardian to review this information with him or her. If parents or guardians have any questions about the material, they can contact the school's appointed suicide prevention liaisons, Noell Scott & Larissa Allen-Jefferson.
2. The school has a designated Crisis Team who provides appropriate resources and support to students, & families in crisis.
3. When a student is identified as being at risk, they will be assessed by a school employed behavioral health professional who will work with the student and help connect them to appropriate local resources.
4. Students will have access to county & national resources which they can contact for additional support, such as:
  - a. [Behavioral Health Resources by County](#)
  - b. [CalHope](#)
  - c. [The National Suicide Prevention Lifeline](#) – Dial or Text 9-8-8
  - d. [The Trevor Project](#) – 1.866.488.7386
5. All students will be expected to help create a school culture of respect and support in which students feel comfortable seeking help for themselves or friends. Students are encouraged to tell any staff member if they, or a friend, are feeling suicidal or in need of help.

Students should also know that because of the life or death nature of these matters, confidentiality or privacy concerns are secondary to seeking help for students in crisis.

## Title I & Title III

Excel Academy Charter School currently receives schoolwide assistance grants based on student/family socioeconomic status upon enrollment. This funding is allocated for direct impact on our at-risk students including English Learners, homeless, foster, juvenile, delinquent, migratory, and any student who is working toward grade level proficiency. Title I funding provides students with the appropriate interventions and resources to improve their academic achievement and meet state standards.

### [School-Parent Compact](#)

Our Parent/School Compact addresses legally required items, as well as other items suggested by parents and family members of Title I, Part A students.

### [Parents Right to Know Letter](#)

If at any time your child has been taught for four or more consecutive weeks by a teacher who is not highly qualified, the school will notify you.

### [Parent and Family Engagement Policy](#)

Excel Academy Charter Schools has developed a written Parent and Family Engagement Policy with input from Title I parents and families. Excel Academy has distributed the Policy to parents of Title I students by posting it on the school website and including it in the Parent and Student Handbook. This Policy describes our means for carrying out Title I parent and family engagement requirements.

Additional information may be found on the California Department of Education website.

[Title I: Improving Academic Achievement - Specialized Programs \(CA Dept of Education\)](#)

Tamara Murphy, Intervention Coordinator  
tmurphy@excelacademy.education

## School Site Council

The School Site Council (SSC) is an advisory board that works together to focus on school goals and student achievement for Excel Academy. This team evaluates progress made toward these goals during a two year term and helps make decisions that benefit all Excel Academy students.

The SSC brings together representatives of Excel Academy's community to:

1. Oversee the School Plan for Student Achievement (SPSA).
2. Act as an advisory board related to various school goals and student learner outcomes.
3. Provide ongoing review and modifications to the SPSA.
4. Review School budget, including the LCAP
5. Evaluate the progress made toward academic goals and student achievement.
6. Promote trust in school decisions that benefit all Excel Academy students.

The SSC consists of:

- Administrators
- Teachers of Record
- Classified staff members
- Parents
- High School Students

## **McKinney-Vento Information**

Excel Academy Charter School adheres to the provisions of the McKinney-Vento Homeless Assistance Act. We ensure that homeless and foster youth have equal access to the same free, appropriate public education as provided to other children and youths in accordance with applicable law.

### **Definition of Homeless:**

The California Department of Education states that the McKinney-Vento Act defines homeless children and youth as individuals who lack a fixed, regular, and adequate nighttime residence.

This definition also includes:

- Children and youth who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason (doubled up or tripled up)
- Children and youth who may be living in motels, hotels, trailer parks, shelters
- Children and youth who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings
- Children and youth who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings (unsheltered)
- Migratory children who qualify as homeless because they are children who are living in similar circumstances listed above

### **Homeless & Foster Students' Rights**

- Be immediately enrolled in school without a permanent address.
- Continue in the school that the student attended before becoming homeless

- EACS students must reside in one of our authorized counties in order to remain enrolled.
- Enroll and attend classes while the school arranges for the transfer of required school records or documents
- Enroll and attend classes even while the school and parent seek to resolve a dispute over enrollment
- Participate in tutoring, school-related activities, and/or receive other support services
- EACS will accept and issue partial credits upon successful completion of a course, even if the class was not complete
- EACS will place student in equivalent courses to allow the student to complete the course (as available)
- If transferring in or after 11th grade students will be evaluated for graduation with the option for reduced credits or a fifth year of study.

Excel Academy will meet the McKinney-Vento and Foster Youth education rights following our regular enrollment policies. See more information at [Homeless Education - Specialized Programs \(CA Dept of Education\)](#) and [Foster Youth Education Rights](#).

If you would like resource support, please contact your ToR or email our Intervention Coordinator, Tamara Murphy at [tmurphy@excelacademy.education](mailto:tmurphy@excelacademy.education).

### **English Learners (ELs)**

ELs are selected for ELPAC testing when the Home Language Survey indicates that their primary home language is a language other than English. Please refer to the EL Master Plan, found on the EACS website, for specific details.

- Excel Academy students are provided structured English immersion including both designated and integrated English Language Development (ELD) Support.. Designated and Integrated Instruction are required for all EACS English Learners. Instruction is delivered and progress monitored by CLAD certified teachers. Curricula includes academic language, speaking, listening, writing, and exposure to rigorous texts. Live designated instruction is provided by our certificated teachers and attendance is required for all ELs.
- ELD class attendance and curriculum participation through assigned coursework is required. Attendance, participation, and progress are monitored weekly. The student, home educator, ToR, and ELD teacher are responsible for ensuring adequate progress. A Progress Improvement Notification (PIN) may be issued for any of the following: repeated class absences, repeated class tardies, failure to complete participation

requirements and/or assignments. Please refer to our English Language Developer ([ELD](#)), [Handbook for Families](#) and/or the [Assessments section](#) above for further information.

### **English Learner Advisory Committee**

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

- Advising the principal and staff in the development of a site plan for English learners and submitting the plan to the SchoolSite Council for consideration of inclusion in the School Plan for Student Achievement.
- Assisting in the development of the schoolwide needs assessment.
- Communicating the importance of regular school attendance.
- California Education Code, sections 35147, 52176(b) and (c), 62002.5, and 64001(a)
- California Code of Regulations, Title 5, Section 11308



# School Calendar



## Excel Academy Charter Schools 2025-2026 Academic Calendar

Sem 1 - 88 Days  
Sem 2 - 87 Days

July						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

August						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

September						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

LPs	Dates	Days
1	8/25-9/19	19
2	9/22-10/24	25
3	10/27-12/5	24
4	12/8-1/16	20
5	1/20-2/20	22
6	2/23-3/20	20
7	3/23-4/24	20
8	4/27-6/1	25
<b>Total</b>		<b>175</b>

October						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

November						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

December						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

January						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

February						
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15	16	17	18	19	20	21
22	23	24	25	26	27	28

March						
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April						
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		

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				

Holidays	
Sept. 1	- Labor Day
Nov. 11	- Veteran's Day
Nov. 24 - Nov. 28	Thanksgiving Break
Dec. 22 - January 2	Winter Break
Jan. 19	- MLK
Feb. 13-16	Presidents Day
Mar. 30 - Apr 3	Spring Break
May 25	Memorial Day
Outside of Instructional endar holidays	
7 / 4 and 6 / 19	

- Graduation
- School holidays
- End of semester

*Printed & digital copies of the handbook in any language are available to be provided upon request.*

# Coversheet

## Consent - Personnel Services

**Section:** VII. Consent  
**Item:** C. Consent - Personnel Services  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Travel Manual 2526.pdf  
REDLINE Travel Manual 2526.pdf

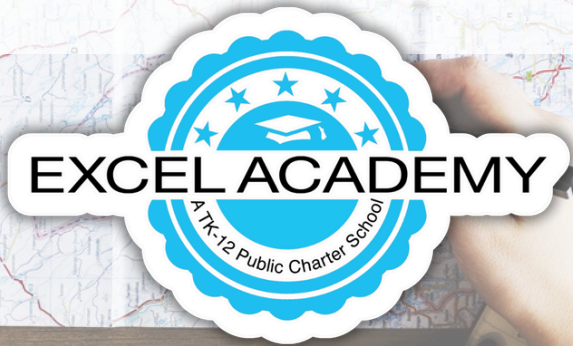
### BACKGROUND:

Item: EACS Travel Manual

Background: Revisions made to the EACS Travel Manual include updating the Superintendent's title from Executive Director, requiring rental insurance for staff renting cars, and removing specific assignments for key conferences.

# Travel & Expense

# MANUAL



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## OVERVIEW

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## TRAVEL EXPENSES/PROCEDURES

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# OVERVIEW



It is the policy of Excel Academy Charter School to reimburse staff for reasonable and necessary expenses incurred during approved work-related travel. Employees seeking reimbursement should incur the lowest reasonable travel expenses and exercise care to avoid impropriety or the appearance of impropriety. Reimbursement is allowed only when reimbursement has not been, and will not be, received from other sources. If a circumstance arises that is not specifically covered in this travel policy, then the most conservative course of action should be taken. Business travel policies are aligned with company reimbursement rules. All business-related travel paid with Excel Academy Charter School funds must comply with school expenditure policies.

## AUTHORIZATION & RESPONSIBILITY >

Staff travel must be authorized. Travelers should verify that planned travel is eligible for reimbursement before making travel arrangements, if it has not already been made for them. Within 30 days of completion of a trip, the traveler must submit for travel reimbursement via Paycom self service portal.

An individual may not approve his or her own travel or reimbursement; a supervisor will be assigned for online approval via Paycom self service portal. Travel reimbursement form must be approved by the Superintendent or the Director of Business Services (for travel over \$5,000) or by the business manager (for travel over \$1,000).

Travel and reimbursement for members of the management team must be approved by the Superintendent and will be reviewed annually by the internal audit.

Designated approval authorities are required to review expenditures and withhold reimbursement if there is reason to believe that the expenditures are inappropriate or extravagant.

## PERSONAL FUNDS

Travelers should review reimbursement guidelines before spending personal funds for business travel to determine if such expenses are reimbursable. Excel Academy Charter School reserves the right to deny reimbursement of travel-related expenses for failure to comply with applicable policies and procedures.

Travelers who use personal funds to facilitate travel arrangements will not be reimbursed until after the trip occurs and proper documentation is submitted.



## VACATION IN CONJUNCTION WITH BUSINESS TRAVEL >

In cases in which vacation time is added to a business trip, any cost variance in airfare, car rental or lodging must be clearly identified on the expense management submission. Excel Academy Charter School will not prepay any personal expenses with the intention of being "repaid" at a later time, nor will any personal expenses be reimbursed.

## EXCEPTIONS >

Occasionally, it may be necessary for travelers to request exceptions to this travel policy. Requests for exceptions to the policy must be made in writing and approved by the supervisor and Superintendent.

Exceptions related to the Superintendent's or the Director of Business Services must be submitted for approval to the opposite person or to the treasurer of the board for approval. In most instances, the expected turnaround time for review and approval is five business days.



# TRAVEL EXPENSES / PROCEDURES



## GENERAL INFORMATION >

**A**uthorized business travel for staff that includes prepayments must be pre-approved and generally pre-booked by the designated Excel staff member. This includes lodging, airfare and car rental. Reimbursement of parking, meals, mileage, gasoline in lieu of mileage and ferry or bus passes do not require pre-approval requests and can be submitted up to (30) days after the trip.

## PERMISSIBLE PREPAID TRAVEL EXPENSES

**Before the travel, Excel Academy Charter School may issue prepayments for airfare, rail transportation, rental vehicles, conference registration fees and cash advances. Applicable policies and methods of payments for these prepayments follow:**

### • AIRFARE

Travelers are expected to obtain the lowest available airfare that reasonably meets business travel needs. Airfare may be prepaid by the Excel business office.

Flights should be booked at least 30 days in advance to avoid premium airfare pricing.

Coach class or economy tickets must be purchased for domestic or international flights with flight time totaling less than five consecutive hours excluding layovers.

A less-than-first-class ticket (i.e. business class) may be purchased at Excel Academy Charter School's discretion for domestic or international flights with flight time exceeding five consecutive hours excluding layovers.

Airfare may be purchased with a credit card or check through the Excel business office with a request on requisition form.



# PERMISSIBLE PREPAID TRAVEL EXPENSES CONTINUED

## • RAIL TRANSPORTATION

Excel Academy Charter School will prepay rail transportation provided that the cost does not exceed the cost of the least expensive airfare.



## • RENTAL VEHICLES

Excel Academy Charter School will pay for approved use of a rental vehicle. See the section on reimbursements below in this section.

Obtaining **FULL RENTAL INSURANCE COVERAGE IS MANDATORY!** This is a reimbursable expense and failure to comply could result in disciplinary action or future prohibition of travel.

## • CONFERENCE REGISTRATION FEES

Conference registration fees can be prepaid with a credit card or check through the Excel business office with submission of a requisition form. Business-related banquets or meals that are considered part of the conference can be paid with the registration fees; however, such meals must be deducted from the traveler's per diem allowance. For example: if a sponsored meal is available staff cannot submit per diem expense reimbursement requests for dining elsewhere.

## • TRAVEL ADVANCES

Cash advances are authorized for specific situations that might cause undue financial hardship for business travelers. These situations are limited to staff traveling on behalf of Excel Academy Charter School. A maximum of 80 percent of the total estimated cost can be advanced, and must be pre-approved 30 days prior to the day of the trip.

Expenses associated with the travel must be reconciled and substantiated within two weeks of the return date. The traveler must repay Excel Academy Charter School for any advances in excess of the approved reimbursable expenses. The department initiating the travel is responsible for notifying the business office to deposit any excess funds into the appropriate departmental account.

Travel advances are processed by submitting a completed requisition form to the business office. Reimbursement for any remaining expenses is processed through Paycom self service portal and approved by the designated approval authority.



# REIMBURSEMENTS



**R** requests for reimbursements of travel-related expenses are submitted via employee Paycom self service portal.

Submissions must be made within two weeks after the trip is completed. Travel Reimbursement forms not submitted within this time frame require exception approval from the Superintendent or from the Director of Business Services.

Reimbursement of travel expenses is based on documentation of reasonable and actual expenses supported by the original, itemized receipts where required. Reimbursements that may be paid by Excel Academy Charter School are shown below:

---

- **AIRFARE**

If the airfare was not prepaid by the business office, an original itemized airline receipt, an e-ticket receipt/statement or an Internet receipt/statement is required. The receipt must show the method of payment and indicate that payment was made.

- **RAIL TRANSPORTATION**

If rail transportation was not prepaid by the business office, an original itemized receipt, original e-ticket receipt/statement or Internet receipt/statement is required. The receipt must show the method of payment and indicate that payment was made.

- **AUTOMOBILE (PERSONALLY OWNED - DOMESTIC TRAVEL)**

A valid driver's license issued within the United States and personal automobile insurance are required for expenses to be reimbursed. Drivers should be aware of the extent of coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature.

Reimbursement for use of a personal automobile is based on the IRS mileage rate.

Paycom self service portal expense submission is required for reimbursement of all mileage expenses. Travelers may opt to request reimbursement for actual gasoline expenses in lieu of the IRS mileage rate.

- **AUTOMOBILE (RENTAL—DOMESTIC TRAVEL)**

Reimbursement for a commercial rental vehicle as a primary mode of transportation is authorized only if the rental vehicle is more economical than any other type of public transportation, or if the destination is not otherwise accessible. Vehicle rental at a destination city is reimbursable. Original receipts are required.

- **AUTOMOBILE (RENTAL—DOMESTIC TRAVEL) CONT.**

Reimbursement for a commercial rental vehicle as a primary mode of transportation is authorized only if the rental vehicle is more economical than any other type of public transportation, or if the destination is not otherwise accessible. Vehicle rental at a destination city is reimbursable. Original receipts are required.

Excel Academy Charter School authorizes reimbursement for the most economic vehicle available. In certain circumstances larger vehicles may be rented, with supervisory approval. The rental agreement must clearly show the date and the points of departure/arrival, as well as the total cost. Drivers must adhere to the rental requirements, and restrictions must be followed. Original receipts are required.

When vehicle rentals are necessary, Excel Academy Charter School encourages travelers to purchase collision damage waiver (CDW) and loss damage waiver (LDW) coverage. Excel Academy Charter School will reimburse the cost of CDW and LDW coverage; all other insurance reimbursements will be denied.

Drivers should be aware of the extent of coverage (if any) provided by his or her automobile insurance company for travel that is business or not personal in nature.

Parking fees, tolls and other incidental costs associated with the vehicle use are not covered by the rental agreement but will be reimbursed through Paycom expense submission.

Travelers are strongly encouraged to fill the gas tank before returning the vehicle to the rental agency to avoid service fees and more expensive fuel rates.

- **CONFERENCE REGISTRATION FEES**

If the conference fee was not prepaid, Excel Academy Charter School will reimburse these fees, including business-related banquets or meals that are part of the conference registration. Original receipts to support the payment are required. If the conference does not provide a receipt, then a canceled check, credit card slip/statement or documentation that the amount was paid is required for reimbursement.

Entertainment activities such as golf outings and sightseeing tours will not be reimbursed if not hosted and sponsored by the school.

Registration fees paid directly by an individual will not be reimbursed until the conference is completed.

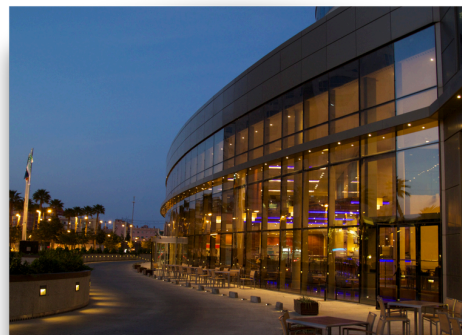
- **LODGING (COMMERCIAL)**

The cost of overnight lodging (room rate and tax only) will be reimbursed to the traveler if the authorized travel is 45 miles or more from the traveler's home or primary worksite.

Exceptions to this restriction may be approved in writing by the Superintendent.

Excel Academy Charter School will reimburse lodging expenses at reasonable, single occupancy or standard business room rates. When the hotel or motel is the conference or convention site, reimbursement will be limited to the conference rate.

Only single room rates are authorized for payment or reimbursement unless the second party is representing the agency in an authorized capacity. If the lodging receipt shows more than a single occupancy, the single room rate must be noted. If reimbursement for more than the single room rate is requested, the name of the second person must be included.



## • MEALS (PER DIEM)

Excel Academy Charter School per diem rates are based on the U.S. General Services Administration Guidelines, which vary by city location. In addition to meals these rates include incidental expenses such as laundry, dry cleaning and service tips (e.g., housekeeping or porter tips). Incidental expenses, unless specifically cited in this policy, will not be reimbursed. Staff is urged to use personal methods of payments for incidentals and not charge items to lodging.

Per diem reimbursements are based on departure and return times over the entire 24-hour day and are prorated accordingly.

If a free meal is included in a conference registration fee and sponsored by the school or host, built into the standard, single hotel room rate or replaced by a legitimate business meal, the per diem allowance for that meal may not be claimed.

Receipts are not required for per diem allowances. Per diem allowances are reimbursed after the trip is completed via Paycom self service portal.

## • BUSINESS MEALS

Travelers are required to follow Excel Academy Charter School expenditure policies when requesting reimbursement for business meals. Original itemized receipts are required. Food and non-alcoholic beverages ONLY can be claimed. Per diem meals include expense of no more than \$105 per day, inclusive of tax and gratuity:



**Breakfast = \$25 (inclusive of tax and gratuity)**

**Lunch = \$35 (inclusive of tax and gratuity)**

**Dinner = \$45 (inclusive of tax and gratuity)**

Employees will be responsible for any overages that exceed the per diem amounts.

## • BUSINESS EXPENSES

Business expenses, including faxes, photocopies, Internet charges, data ports, airline WiFi, and business telephone calls incurred while on travel status, can be reimbursed. Original itemized receipts are required.

## • PARKING

Original receipts are required for parking fees (including airport parking). The lodging bill can be used as a receipt when charges are included as part of the overnight stay.

## • TELEPHONE CALLS

The costs of personal telephone calls are the responsibility of the individual.

## • TOLLS

Original receipts are required for tolls.

## • MISCELLANEOUS TRANSPORTATION

Original receipts are required for taxi, bus, subway, metro, ferry and other modes of transportation.



## • VISA, PASSPORT FEES, AND IMMUNIZATIONS

If these items are required for international travel, their reimbursement is left to the discretion of your supervisor. If approved by the designated authority, original itemized receipts are required.



## • NON-REIMBURSABLE TRAVEL EXPENSES

The following items that may be associated with business travel will not be reimbursed by Excel Academy Charter School:

- Airline club memberships.
- Airline upgrades.
- Business class for domestic flights or first class for all flights.
- Child care, babysitting, house-sitting, or pet-sitting/kennel charges.
- Commuting between home and the primary work location.
- Costs incurred by traveler's failure to cancel travel or hotel reservations in a timely fashion unless company sponsored cancellation.
- Evening or formal wear expenses.
- Haircuts and personal grooming.
- Laundry and dry cleaning.
- Alcoholic beverages.
- Passports, vaccinations and visas when not required as a specific and necessary condition of the travel assignment.
- Personal entertainment expenses, including in-flight movies, headsets, health club facilities, hotel pay-per-view movies, in-theater movies, social activities and related incidental costs.
- Travel accident insurance premiums or purchase of additional travel insurance.
- Other expenses not directly related to business travel.

## • TRAVEL FOR NON-EMPLOYEES

Additional costs for travel, lodging, meal or other travel expenses for spouses or other family members will not be reimbursed unless the individual has a bona fide company purpose for engaging in the travel or attending the event. Such travel is generally limited to Executive Administration and should occur infrequently.



# REQUIRED ANNUAL TRAVEL FOR ADMINISTRATIVE STAFF :

- ALL EXECUTIVE CABINET
- ALL DIRECTORS
- APPLICABLE ASSISTANT DIRECTORS

**APLUS+ NETWORKING CONFERENCE**

**CCSA**

**CSDC**

**ADMIN SUMMIT**

**SELPA MEETINGS**

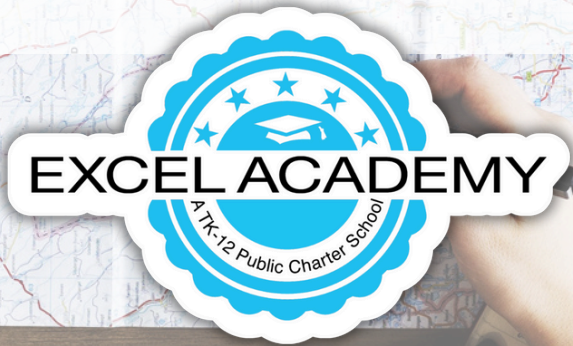


As Administrative representation is important at local and state industry conferences, we ask all Administrative staff to make a commitment to attending the required events. We ask that staff are in attendance the duration of the event and complete any sessions assigned by the Superintendent.

Written request must be submitted 30 days prior to, or at earliest notice, to the Superintendent that Administrative staff is unable to attend mandatory conference events.

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Entertainment activities such as golf outings and sightseeing tours will not be reimbursed if not hosted and sponsored by the school.

Registration fees paid directly by an individual will not be reimbursed until the conference is completed.



## • **LODGING (COMMERCIAL)**

The cost of overnight lodging (room rate and tax only) will be reimbursed to the traveler if the authorized travel is 45 miles or more from the traveler's home or primary worksite.

Exceptions to this restriction may be approved in writing by the ~~Superintendent~~ ~~Executive Director~~.

Excel Academy Charter School will reimburse lodging expenses at reasonable, single occupancy or standard business room rates. When the hotel or motel is the conference or convention site, reimbursement will be limited to the conference rate.

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Receipts are not required for per diem allowances. Per diem allowances are reimbursed after the trip is completed via Paycom self service portal.

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Travelers are required to follow Excel Academy Charter School expenditure policies when requesting reimbursement for business meals. Original itemized receipts are required. Food and non-alcoholic beverages ONLY can be claimed. Per diem meals include expense of no more than \$105 per day, inclusive of tax and gratuity:



**Breakfast = \$25 (inclusive of tax and gratuity)**  
**Lunch = \$35 (inclusive of tax and gratuity)**  
**Dinner = \$45 (inclusive of tax and gratuity)**

Employees will be responsible for any overages that exceed the per diem amounts.

- **BUSINESS EXPENSES**

Business expenses, including faxes, photocopies, Internet charges, data ports, airline WiFi, and business telephone calls incurred while on travel status, can be reimbursed. Original itemized receipts are required.

- **PARKING**

Original receipts are required for parking fees (including airport parking). The lodging bill can be used as a receipt when charges are included as part of the overnight stay.

- **TELEPHONE CALLS**

The costs of personal telephone calls are the responsibility of the individual.

- **TOLLS**

Original receipts are required for tolls.

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Original receipts are required for taxi, bus, subway, metro, ferry and other modes of transportation.



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- Alcoholic beverages.
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# REQUIRED ANNUAL TRAVEL FOR ADMINISTRATIVE STAFF :

- ALL EXECUTIVE DIRECTORS
- ALL DIRECTORS
- APPLICABLE ASSISTANT DIRECTORS

## **APLUS+ NETWORKING CONFERENCE**

**OCTOBER**

~~(ALTERNATES NOR CAL AND SO CAL) IN 23/24  
WILL BE NOR CAL.~~

**CCSA MARCH**

~~(ALTERNATES NOR CAL AND SO CAL) IN 23/24  
WILL BE SO CAL.~~

**CSDC NOVEMBER OR EARLY DECEMBER**

~~(ALTERNATES NOR CAL AND SO CAL) IN 23/24  
WILL BE SO CAL.~~

**ADMIN SUMMIT :JANUARY**

**SELPA MEETINGS: 4 MEETINGS PER YEAR**

~~HEIDI AND LARA ULMER (2 MEETINGS A YEAR) OR  
HEIDI AND LARRY ALVARADO (2 MEETINGS)~~



As Administrative representation is important at local and state industry conferences, we ask all Administrative staff to make a commitment to attending the required events. We ask that staff are in attendance the duration of the event and complete any sessions assigned by the **Superintendent-Executive Director.**

Written request must be submitted 30 days prior to, or at earliest notice, to the **Superintendent Executive Director** that Administrative staff is unable to attend mandatory conference events.

Staff unable to attend events for non-business related purposes must complete submission of the appropriate alternative time management request via Paycom self service portal.

# Coversheet

## Approval of the Annual Board of Director's Self-Evaluation

**Section:** VIII. Board Governance  
**Item:** A. Approval of the Annual Board of Director's Self-Evaluation  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Board Self-Evaluation (24\_25).pdf



# BOARD SELF-EVALUATION

# 1. A Solid Foundation

**100%**  
Yes

Does the school have a well-drafted charter contract with its authorizing agencies?

**100%**  
Yes

Does the school have well-drafted articles and bylaws?

**100%**  
Yes

Is the school's legal and financial status clear and well understood?

**100%**  
Yes

Are appropriate liability insurance and risk management practices maintained at all times?

**100%**  
Yes

Does your board schedule Study Sessions for deeper strategy sessions/strategic discussions throughout the year?

**100%**  
Yes

Does your Superintendent have a clear strategic vision for the organization?

**100%**  
Yes

Does the board have a clear set of goals for the year that clearly delineate how it will add value to the organization?

## 2. Board Operations/Relations

100%  
Yes

Do Board members understand their legal and ethical responsibilities (duty of care/loyalty, conflict of interest)?

60%  
Yes

Are new board members oriented and fully briefed prior to being seated?

**Study sessions would be a great place to discuss future Board Selection Process**

100%  
Yes

Is the Board composed of individuals with a broad and appropriate range of expertise and experience? Does the Board seek outside counsel for matters beyond its expertise?

80%  
Yes

Does the Board member selection process ensure a broad and appropriate range of expertise and experience?

40%  
Yes

Does the Board actively participate in the creation of the long-term board recruitment plan?

100%  
Yes

Does the board have an effective and consistent process to measure progress toward achieving annual board goals?

100%  
Yes

Annually, does the board create a board meeting calendar outlining all the board meetings and other important board related dates for the entire year?

100%  
Yes

Do the board president and the Superintendent work collaboratively to create the board meeting agenda?

## 2. Board Operations/Relations

100%  
Yes

Does the board use a consistent agenda format that delineates topic, duration, associated meeting materials, and the action that will be required?

100%  
Yes

Are the board meeting materials sent out by your Superintendent very clear, well-organized, and easy to understand?

100%  
Yes

Are board meetings run efficiently?

100%  
Yes

Has the Board president has developed meeting norms?

100%  
Yes

Are meeting materials (minutes from the previous meeting, reports, financial statements, etc.) consistently distributed at least three days in advance of the meeting?

100%  
Yes

Do you feel like you have a thorough understanding of the Brown Act?

100%  
Yes

Do you always read the board meeting materials in advance of the meeting?

100%  
Yes

Does the secretary (Lauren) consistently take board meeting minutes?

# 3. Relationship with CEO

The World is our Classroom

100%  
Yes

Is there a clear and consistent process for evaluating the Superintendent on an annual basis?

100%  
Yes

Does the Superintendent have an up-to-date job description?

100%  
Yes

Does the board have a clear and consistent process for providing coaching, feedback, and support to the Superintendent?

100%  
Yes

Is there a clear understanding between the board and the Superintendent about what the organization is doing towards reaching its defined vision of excellence?

100%  
Yes

Does your Superintendent communicate clearly and effectively with the board?

80%  
Yes

Has the Board established a plan for succession in the event the Superintendent leaves/retires?

## 4. Personnel & Staffing

80%

Yes

Does your Superintendent and the board have an agreed upon short-term/ emergency succession plan for their position?

Continue to keep current with the process in the event if needed.

100%

Yes

Has your Superintendent and the board discussed a long-term succession management plan?

100%

Yes

Are clear job descriptions and staffing plans in place?



# 5. Budget & Finance

100%

Yes

Does the Board adopt an annual budget that maximizes the school's resources in support of mission/vision?

100%

Yes

Does the Board monitor the budget throughout the year via monthly updates, first interim budget and second interim budget?

100%

Yes

Does the Board contract with an independent auditor each year, reviews the audit report, and takes any needed follow-up action?

100%

Yes

Has the Board adopted a three year financial plan in coordination with the school's overall three year plan (WASC, LCAP)?

100%

Yes

Has the Board adopted a comprehensive set of fiscal management and control policies?

## 6. Instruction, Curriculum, and Assessment

100%  
Yes

Has the Board adopted/approved LCAP goals/standards?

100%  
Yes

Does the School report on student achievement to Authorizing agencies on a regular basis as part of the ongoing oversight and renewal process?

# Comments

## STRENGTHS

- ❖ The Board and the schools leadership team have a great working relationship
- ❖ Great commonality of purpose - strong communication and enjoyment of our meetings.
- ❖ Superintendent's goals are developed collaboratively with the Board, and with input from the Leadership Team. In turn, these goals are incorporated among the entire leadership team and staff. Lastly, the adopted goals are specifically addressed in the monthly Board updates and reports from each department.
- ❖ The Board members collectively share the same high expectations, values, and beliefs of an effective school. Board members respect each other's opinions and comments. Board members work collaboratively with the Superintendent. The Board is accountability driven ensuring students are successful.
- ❖ Heidi is an outstanding superintendent! She is hardworking and dedicated in all areas of school administration. She always creates a positive tone and is consistent in her approach in supporting her staff. Heidi is to be commended for her superior leadership skills, passion, as well as her vision and strong ability to problem solve and reach successful goals. Her focus is for the overall wellbeing for her staff and for all the families and students Excel serves.

## AREAS OF GROWTH

- ❖ Work on getting all board member proficient in computer skills so not to delay meeting or violating the Brown Act by responding to "All"
- ❖ I believe it would be helpful to periodically review the succession plan in case the Superintendent needs to take a leave of absence.
- ❖ To continue working collaboratively with leadership team in pursuing school-wide goals.

# Coversheet

## Approval of Unaudited Actuals for the 2024-2025 School Year

**Section:** IX. Business/Financial Services  
**Item:** A. Approval of Unaudited Actuals for the 2024-2025 School Year  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 25-09-11 FY25 Unaudited Actuals.pptx.pdf  
9.11.25 FY25 Combined Balance Sheet.pdf  
9.4.25 FY25 Helendale Income Statement.pdf  
9.11.25 FY25 Combined Income Statement.pdf  
9.4.25 FY25 Warner Income Statement.pdf

### BACKGROUND:

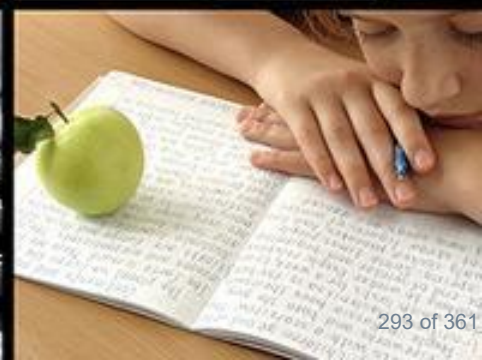
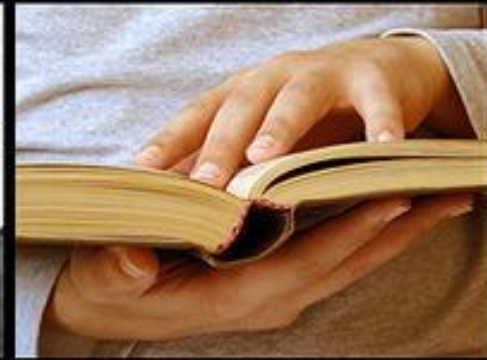
Under the stipulations outlined in the Memorandum of Understanding between Excel Academy Charter Schools and the authorizing districts, it is mandated that the unaudited actuals of revenues and expenditures from the preceding fiscal year receive approval from the Board of Directors by September 15 of each year. These unaudited actuals will undergo meticulous scrutiny by independent auditors and subsequently be featured in an annual independent audit report, which must be submitted to the state by December 15th.

### RECOMMENDATION:

It is recommended that the Board of Directors approve the 2024-25 Unaudited Actuals as presented.



# Excel Academy Charter Schools FY24-25 Unaudited Actuals September 11, 2025





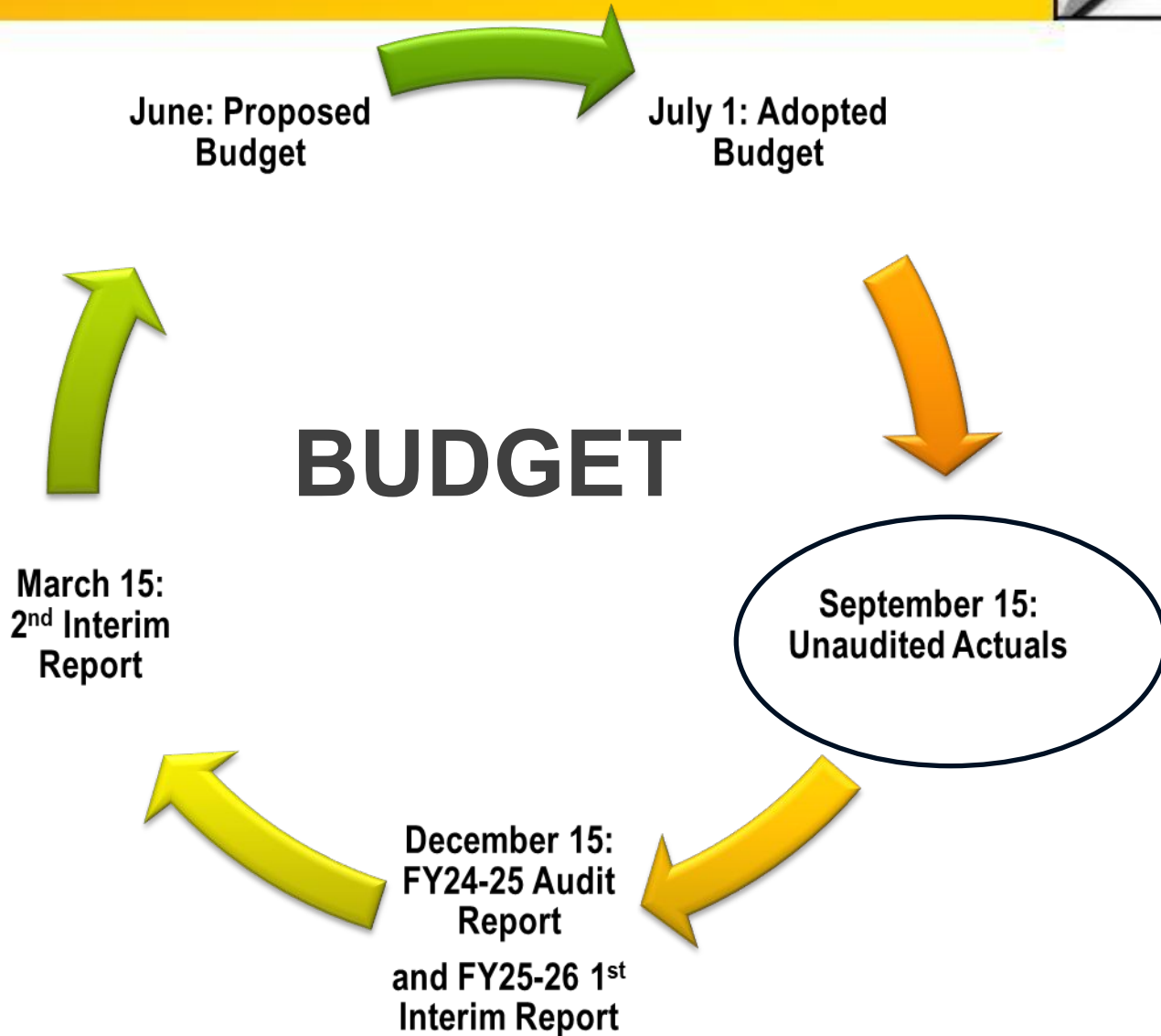
# Presentation Overview

1

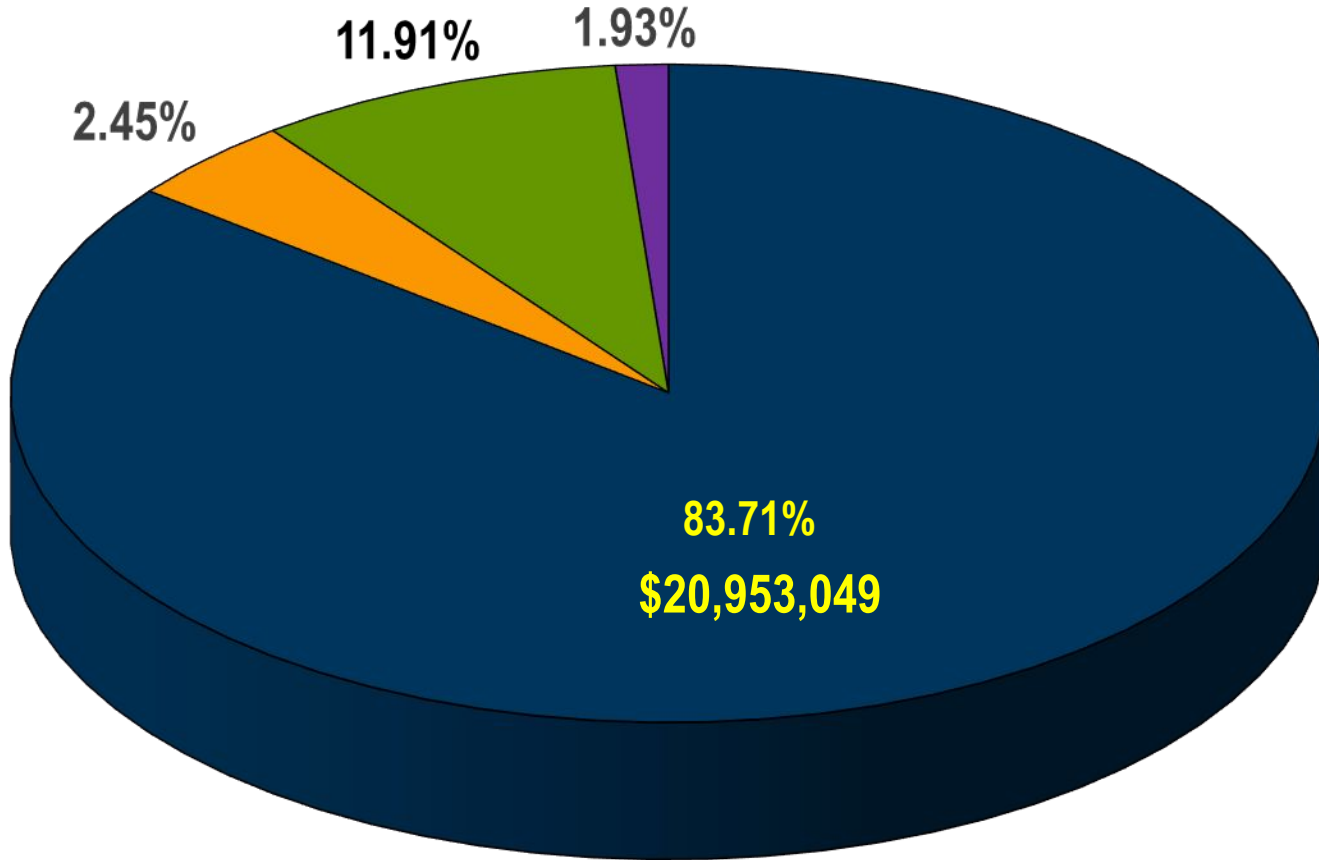
- **Budget Cycle**
- **Operating Revenues**
- **Operating Expenses**
- **FY24 Statement of Activities**
- **Ending Balance History**
- **Summary**



# The Budget Cycle



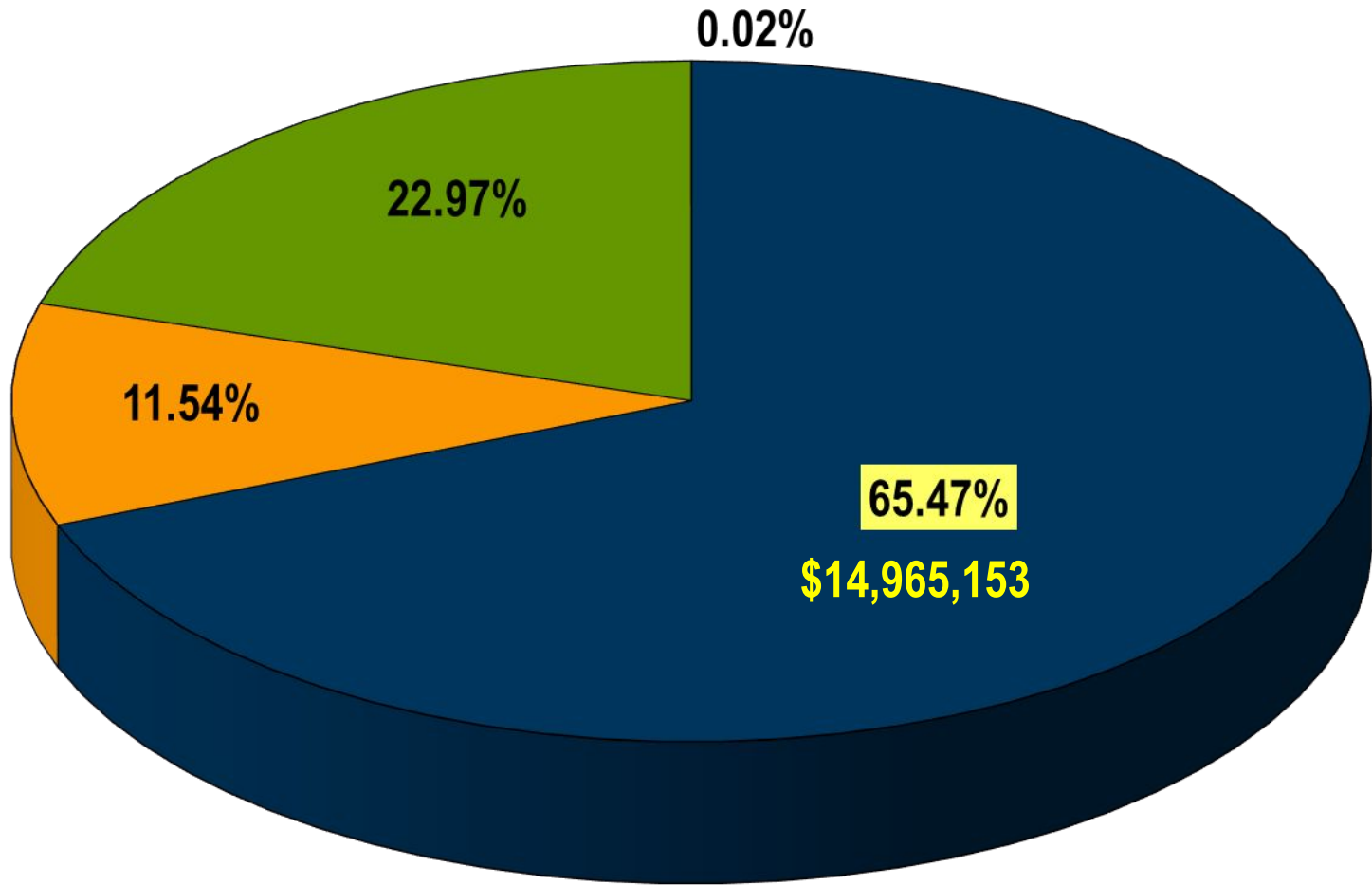
# FY24 Operating Revenues - \$25,030,145



■ LCFF Revenues   ■ Federal Revenues   ■ State Revenues   ■ Local Revenues



# FY24 Operating Expenses - \$22,855,489



■ Salaries and Benefits ■ Books and Supplies ■ Services ■ Miscellaneous

# FY2024-25 Statement of Activities

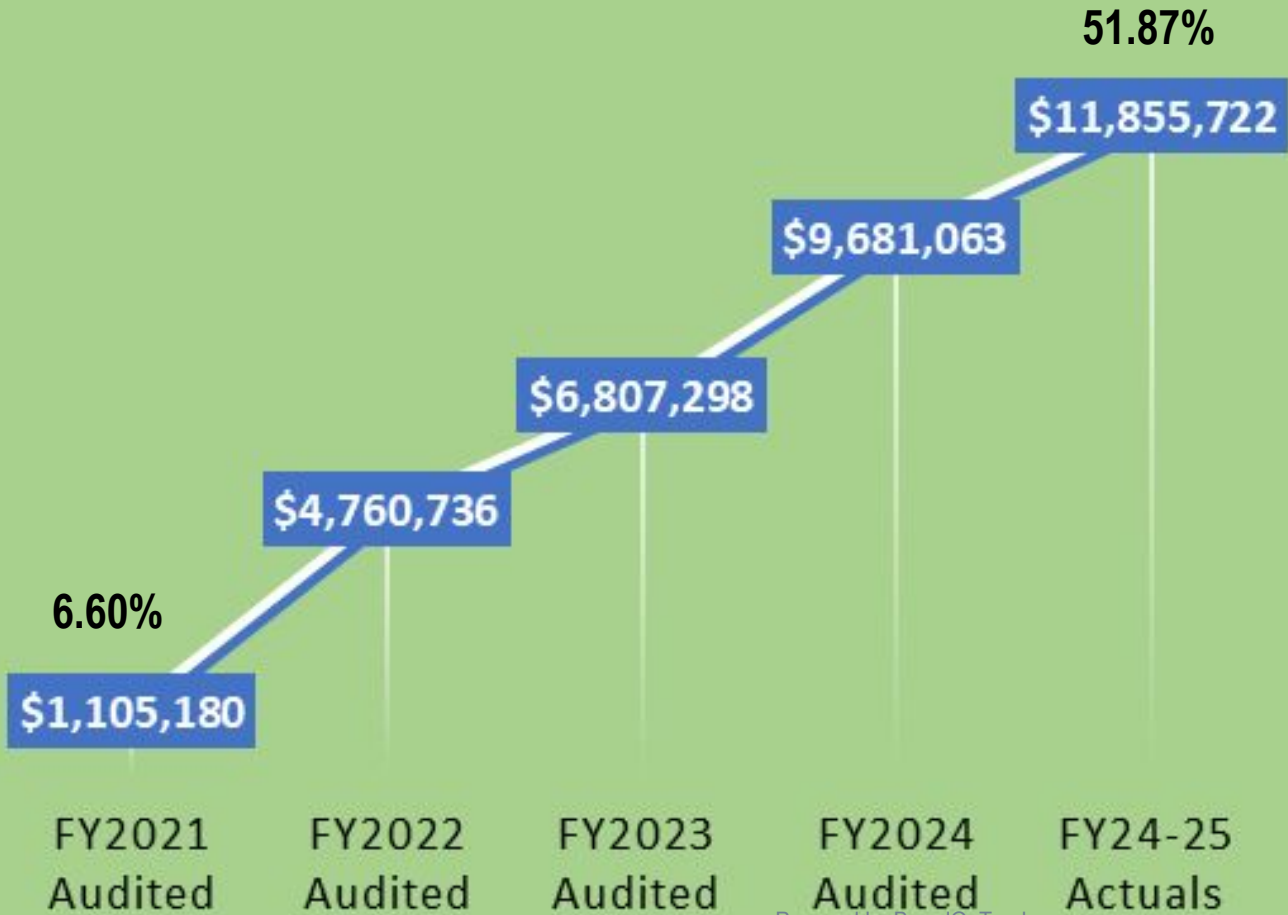


	2024-25
<b>Total Revenues</b>	<b>25,030,145</b>
<b>Total Expenditures</b>	<b>22,855,489</b>
<b>Increase in Fund Balance</b>	<b>2,174,655</b>
<b>Beginning Balance</b>	<b>9,681,066</b>
<b>Ending Balance</b>	<b>11,855,722</b>
<b>Adjustments to Ending Fund Balance</b>	
<b>Restricted Carryover Balances</b>	
<b>15% Required for Economic Uncertainties</b>	<b>3,428,323</b>
<b>Unappropriated Fund Balance Above 15%</b>	<b>8,427,399</b>
<b>Ending Balance Percent Of Expenditures</b>	<b>51.87%</b>



# Reserve Historical Balance - Actuals

## RESERVE BALANCE





# Summary

9

- **Ending Balance - \$11,855,722 or 51.83%**
- **FY24 Average Monthly Revenues - \$2,085,845**
- **FY24 Average Monthly Expenses - \$1,904,624**
- **As of June 30, 2024, Cash Balance - \$10.6 Million**
  - **SDCOE - \$2,525,641**
  - **Chase Bank - \$1,452,781**
  - **Certificate of Deposit Chase Bank - \$6,554,264**
- **Six Months of Cash**
- **FY25 Audit Field Work In Progress**

**Balance Sheet**

As of Date:

	<b>All Resources</b>
	<b>06/30/2025</b>
<b>91XX-94XX ASSETS</b>	
9110-9199 Cash and Cash Equivalents	
Cash in County Treasury - Warner	2,525,641.87
Cash in Banks-1 9313	1,452,781.32
Cash in Banks-2 2892	132.81
Cash in Banks-3 6995	0.00
Cash in Certificate of Deposit (CD)	6,554,264.12
Cash with Fiscal Agents	34,776.00
Total 9110-9199 Cash and Cash Equivalents	10,567,596.12
9200-9299 Accounts Receivable and Other Receivable	
Accounts Receivable	20,540.15
Accounts Receivable-Prior Year	2,806,944.66
Total 9200-9299 Accounts Receivable and Other Receivable	2,827,484.81
9300-9399 Due From	
InterFund Receivable	4,789.16
Prepaid Expenses	134,523.20
Parent PayPal Account	552.51
Total 9300-9399 Due From	139,864.87
9400-9499 WP/ Fixed Assets/ Incl. Depr.	
Fixed Assets	137,661.00
Accumulated Depreciation - Equipment	(29,761.05)
Total 9400-9499 WP/ Fixed Assets/ Incl. Depr.	107,899.95
<b>Total 91XX-94XX ASSETS</b>	<b>13,642,845.75</b>
<b>95XX-96XX LIABILITIES &amp; DEFERRED REVENUES</b>	
9500-Accounts Payable	
Accounts Payable	422,678.68
Total 9500-Accounts Payable	422,678.68
9501-9596 Other Payables	
Purchase Card - Stampli	2,854.80
Purchase Card - Chase	12,655.32
Voluntary FSA	8,098.63
Voluntary 403b	910.00
Voluntary Insurance	2,670.76
Voluntary HSA	744.66
Accrued Salary & Wages	17,859.56
Prior Year Liabilities	13,749.00
Use Tax Payable	475.02

Total 9501-9599 Other Payables	60,017.75
9610-9699 Due to Other Funds	
InterFund Liability	4,789.16
Current Loans	43,020.12
Deferred Revenue	1,189,683.34
Long-Term Liabilities	66,934.85
Total 9610-9699 Due to Other Funds	1,304,427.47
<b>Total 95XX-96XX LIABILITIES &amp; DEFERRED REVENUES</b>	<b>1,787,123.90</b>
<b>97XX-FUND BALANCE</b>	
Fund Balance	
Fund Balance Audit Adjustments	
<b>Total 97XX-FUND BALANCE</b>	<b>11,855,721.85</b>

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Statement of Activities - All Funds

As of Date:

Location:

	<b>All Resources</b>
	<b>06/30/2025</b>
8000-8799 REVENUES	
8010-8099 LCFF SOURCES	
LCFF General Entitlement	7,883,661.00
EPA Entitlement	164,355.00
Prior Year Unrestricted Revenue	(6,595.00)
In-Lieu-Of Property Taxes	125,769.00
Total 8010-8099 LCFF SOURCES	8,167,190.00
8100-8299 FEDERAL REVENUES	
Federal IDEA SpEd Revenue - Local Assistance	95,695.00
SpEd - Discretionary Grants	7,686.00
Other Federal Revenue	123,711.00
Total 8100-8299 FEDERAL REVENUES	227,092.00
8300-8599 OTHER STATE REVENUE	
AB602 State SpEd Revenue	594,887.00
AB602 State SpEd Revenue - Prior Year	(21,856.00)
Mandated Cost Reimbursements	16,056.00
Lottery - State	203,223.11
Other State Revenue	376,204.20
Total 8300-8599 OTHER STATE REVENUE	1,168,514.31
8600-8799 OTHER LOCAL REVENUE	
Interest Income	151,681.68
Other Revenue	706.14
AB602 Transfers Of Apportionment from County	11,025.00
Total 8600-8799 OTHER LOCAL REVENUE	163,412.82
<b>Total 8000-8799 REVENUES</b>	<b>9,726,209.13</b>
1XXX-7XXX By Sub Objects	
1100-Certificated Teachers' Salaries	2,606,726.92
1200-Certificated Pupil Support Salaries	346,123.12
1300-Certificated Supervisors' & Admin Salaries	644,281.05
1900-Other Certificated Salaries	52,558.20
2100-Classified Instructional Salaries	65,825.47
2300-Classified Supervisors' & Admin Salaries	220,775.12
2400-Clerical, Technical & Office Salaries	317,643.92
3101-3102-STRS	
STRS Certificated	655,976.33
Total 3101-3102-STRS	655,976.33

Statement of Activities - All Funds

As of Date:

3301-3302-OASDI/Medicare/Alternative	
OASDI/Medicare	52,483.93
OASDI/Medicare - Classified	45,640.00
Total 3301-3302-OASDI/Medicare/Alternative	98,123.93
3401-3402-Health & Welfare Benefits	
Health Care Certificated	374,320.68
Health Care Classified	73,960.48
Total 3401-3402-Health & Welfare Benefits	448,281.16
3501-3502-Unemployment Insurance	
Unemployment Insurance Certificated	9,746.40
Unemployment Insurance Classified	2,641.81
Total 3501-3502-Unemployment Insurance	12,388.21
3601-3602-Workers' Compensation	
Workers' Comp Certificated	14,587.66
Workers' Comp Classified	2,611.36
Total 3601-3602-Workers' Compensation	17,199.02
3901-3990 Other Benefits	
Other Benefits Cert	33,039.43
Other Benefits Class	19,688.96
PY Benefit Adjustments	(1,228.23)
Total 3901-3990 Other Benefits	51,500.16
4100-Approved Textbooks & Curricula Materials	434,495.68
4300-Materials & Supplies	483,017.61
4400-Noncapitalized Equipment	0.00
5100-Subagreements for Services	100,349.22
5200-Travel & Conferences	65,377.61
5300-Dues & Memberships	53,862.13
5400-5450-Insurance	32,976.42
5600-Rentals, Leases, Repairs & Noncap. Improvements	203,508.84
5800-Professional/Consulting & Operating Services	1,462,931.85
5900-Communications	113,993.59
Total 1XXX-7XXX By Sub Objects	8,487,915.56
<b>NET ASSETS INCOME</b>	<b>1,238,293.57</b>

Statement of Activities - All Funds

As of Date:

	<b>All Resources</b>
	<b>06/30/2025</b>
8000-8799 REVENUES	
8010-8099 LCFF SOURCES	
LCFF General Entitlement	19,830,141.00
EPA Entitlement	374,977.00
Prior Year Unrestricted Revenue	116.00
In-Lieu-Of Property Taxes	747,815.00
Total 8010-8099 LCFF SOURCES	20,953,049.00
8100-8299 FEDERAL REVENUES	
Federal IDEA SpEd Revenue - Local Assistance	289,206.00
SpEd - Discretionary Grants	33,547.00
Other Federal Revenue	292,666.00
Total 8100-8299 FEDERAL REVENUES	615,419.00
8300-8599 OTHER STATE REVENUE	
AB602 State SpEd Revenue	1,546,885.00
AB602 State SpEd Revenue - Prior Year	(70,972.00)
Mandated Cost Reimbursements	42,682.00
Lottery - State	501,885.11
PY State - Restricted Revenue	49,476.00
Other State Revenue	912,134.30
Total 8300-8599 OTHER STATE REVENUE	2,982,090.41
8600-8799 OTHER LOCAL REVENUE	
Interest Income	416,842.97
Other Revenue	1,858.25
AB602 Transfers Of Apportionment from County	60,885.00
Total 8600-8799 OTHER LOCAL REVENUE	479,586.22
<b>Total 8000-8799 REVENUES</b>	<b>25,030,144.63</b>
1XXX-7XXX By Sub Objects	
1100-Certificated Teachers' Salaries	7,166,077.90
1200-Certificated Pupil Support Salaries	956,348.81
1300-Certificated Supervisors' & Admin Salaries	1,775,861.58
1900-Other Certificated Salaries	146,483.26
2100-Classified Instructional Salaries	185,772.22
2300-Classified Supervisors' & Admin Salaries	609,458.95
2400-Clerical, Technical & Office Salaries	877,601.08
3101-3102-STRS	
STRS Certificated	1,568,170.89
Total 3101-3102-STRS	1,568,170.89
3301-3302-OASDI/Medicare/Alternative	
OASDI/Medicare	144,606.61
OASDI/Medicare - Classified	126,430.38

Statement of Activities - All Funds

As of Date:

Total 3301-3302-OASDI/Medicare/Alternative	271,036.99
3401-3402-Health & Welfare Benefits	
Health Care Certificated	984,748.57
Health Care Classified	194,630.59
Total 3401-3402-Health & Welfare Benefits	1,179,379.16
3501-3502-Unemployment Insurance	
Unemployment Insurance Certificated	25,869.23
Unemployment Insurance Classified	7,154.08
Total 3501-3502-Unemployment Insurance	33,023.31
3601-3602-Workers' Compensation	
Workers' Comp Certificated	40,093.17
Workers' Comp Classified	7,222.68
Total 3601-3602-Workers' Compensation	47,315.85
3901-3990 Other Benefits	
Other Benefits Cert	87,763.11
Other Benefits Class	64,105.69
PY Benefit Adjustments	(3,245.45)
Total 3901-3990 Other Benefits	148,623.35
4100-Approved Textbooks & Curricula Materials	1,059,291.86
4300-Materials & Supplies	1,578,949.17
4400-Noncapitalized Equipment	0.00
5100-Subagreements for Services	228,692.72
5200-Travel & Conferences	172,082.94
5300-Dues & Memberships	144,288.38
5400-5450-Insurance	86,780.02
5600-Rentals, Leases, Repairs & Noncap. Improvements	275,409.99
5800-Professional/Consulting & Operating Services	4,045,117.51
5900-Communications	299,723.45
<b>Total 1XXX-7XXX By Sub Objects</b>	<b>22,855,489.39</b>
<b>NET INCOME</b>	<b>2,174,655.24</b>

Statement of Activities - All Funds

As of Date:

Location:

	<b>All Resources</b>
	<b>06/30/2025</b>
8000-8799 REVENUES	
8010-8099 LCFF SOURCES	
LCFF General Entitlement	11,946,480.00
EPA Entitlement	210,622.00
Prior Year Unrestricted Revenue	6,711.00
In-Lieu-Of Property Taxes	622,046.00
<b>Total 8010-8099 LCFF SOURCES</b>	<b>12,785,859.00</b>
8100-8299 FEDERAL REVENUES	
Federal IDEA SpEd Revenue - Local Assistance	193,511.00
SpEd - Discretionary Grants	25,861.00
Other Federal Revenue	168,955.00
<b>Total 8100-8299 FEDERAL REVENUES</b>	<b>388,327.00</b>
8300-8599 OTHER STATE REVENUE	
AB602 State SpEd Revenue	951,998.00
AB602 State SpEd Revenue - Prior Year	(49,116.00)
Mandated Cost Reimbursements	26,626.00
Lottery - State	298,662.00
PY State - Restricted Revenue	49,476.00
Other State Revenue	535,930.10
<b>Total 8300-8599 OTHER STATE REVENUE</b>	<b>1,813,576.10</b>
8600-8799 OTHER LOCAL REVENUE	
Interest Income	265,161.29
Other Revenue	1,152.11
AB602 Transfers Of Apportionment from County	49,860.00
<b>Total 8600-8799 OTHER LOCAL REVENUE</b>	<b>316,173.40</b>
<b>Total 8000-8799 REVENUES</b>	<b>15,303,935.50</b>
1XXX-7XXX By Sub Objects	
1100-Certificated Teachers' Salaries	4,559,350.98
1200-Certificated Pupil Support Salaries	610,225.69
1300-Certificated Supervisors' & Admin Salaries	1,131,580.53
1900-Other Certificated Salaries	93,925.06
2100-Classified Instructional Salaries	119,946.75
2300-Classified Supervisors' & Admin Salaries	388,683.83
2400-Clerical, Technical & Office Salaries	559,957.16
3101-3102-STRS	
STRS Certificated	912,194.56
<b>Total 3101-3102-STRS</b>	<b>912,194.56</b>
3301-3302-OASDI/Medicare/Alternative	
OASDI/Medicare	92,122.68
OASDI/Medicare - Classified	80,790.38



3401-3402-Health & Welfare Benefits	
Health Care Certificated	610,427.89
Health Care Classified	120,670.11
<b>Total 3401-3402-Health &amp; Welfare Benefits</b>	<b>731,098.00</b>
3501-3502-Unemployment Insurance	
Unemployment Insurance Certificated	16,122.83
Unemployment Insurance Classified	4,512.27
<b>Total 3501-3502-Unemployment Insurance</b>	<b>20,635.10</b>
3601-3602-Workers' Compensation	
Workers' Comp Certificated	25,505.51
Workers' Comp Classified	4,611.32
<b>Total 3601-3602-Workers' Compensation</b>	<b>30,116.83</b>
3901-3990 Other Benefits	
Other Benefits Cert	54,723.68
Other Benefits Class	44,416.73
PY Benefit Adjustments	(2,017.22)
<b>Total 3901-3990 Other Benefits</b>	<b>97,123.19</b>
4100-Approved Textbooks & Curricula Materials	624,796.18
4300-Materials & Supplies	1,095,931.56
4400-Noncapitalized Equipment	0.00
5100-Subagreements for Services	128,343.50
5200-Travel & Conferences	106,705.33
5300-Dues & Memberships	90,426.25
5400-5450-Insurance	53,803.60
5600-Rentals, Leases, Repairs & Noncap. Improvements	71,901.15
5800-Professional/Consulting & Operating Services	2,582,185.66
5900-Communications	185,729.86
<b>Total 1XXX-7XXX By Sub Objects</b>	<b>14,367,573.83</b>
<b>NET INCOME</b>	<b>936,361.67</b>

# Coversheet

## Approval of the Proposition 28 Arts & Music Grant Annual Report

**Section:** IX. Business/Financial Services  
**Item:** B. Approval of the Proposition 28 Arts & Music Grant Annual Report  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** FY25 Prop 28 Program.docx.pdf  
Prop 28 2024-25 Annual Certification-Helendale.pdf  
Prop 28 2024-25 Annual Certification-Warner.pdf

### BACKGROUND:

Proposition 28, which established the Arts and Music in Schools—Funding Guarantee and Accountability Act, included an annual reporting requirement for local educational agencies (LEAs). As a condition of receiving funds, an LEA must submit a report approved by its local governing board to the California Department of Education (CDE), and the report must be posted on the LEA's website. Per [Education Code Section 8820 \(g\)\(4\)](#), the report must detail the following:

- The type of arts education programs funded
- The number of full-time equivalent teachers, classified personnel, and teaching aides
- The number of pupils served
- The number of school sites providing arts education programs with Proposition 28 funds

At its meeting on March 24, 2024, the Board of Directors approved implementing the Proposition 28 Art and Music in Schools program for the 2025-26 school year.

### RECOMMENDATION:

It is recommended the Board of Directors approve the Proposition 28 Art and Music in Schools Annual Report as presented.

# PROP. 28 - ARTS & MUSIC

## FUNDS PROPOSAL

PREPARED FOR

EXCEL ACADEMY CHARTER SCHOOL BOARD OF  
DIRECTORS

PREPARED BY

EXCEL ACADEMY CHARTER SCHOOL GENERAL  
EDUCATION DEPARTMENT



## PROPOSAL DETAILS

<b>PROJECT TITLE</b>	Proposition 28 Arts & Music Funds Proposal		
<b>SUBMITTED BY</b>	EACS General Education Department	<b>TOTAL GRANT BUDGET</b>	\$ 229,354 annually (Warner & Helendale combined)
<b>DATE OF PROPOSAL</b>	March 14, 2024	<b>VERSION NO.</b>	1
<b>PROJECTED START DATE</b>	2024-2025 School Year		

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## 1. PROJECT OVERVIEW

### 1.1 OUR OBJECTIVES

The objective is to establish a new and ongoing program at Excel Academy Charter School that will support arts instruction, specifically in the areas of art and music. The arts are a necessary part of a well-rounded education, helping students connect with school, having a positive impact on student attendance and school climate. With these funds, we are providing every student with a creative outlet.

### 1.2 COST + TIMELINE ESTIMATES

The total grant is budgeted at \$229,354 each school year.

## 2. NEEDS AND ISSUES

<b>NEED / ISSUE DESCRIPTION</b>	
	<p>Excel Academy Charter School will create a comprehensive art program that caters to both personalized and virtual students within the school. The art teacher will curate a diverse range of art classes that will be available to all students. Personalized students will have the option to enroll in weekly art classes facilitated by Excel Teacher Led (ETL) instructors. These classes will be scheduled as part of the students' curriculum. Additionally, drop-in art sessions will be organized in various school settings, accommodating both online and in-person participation. For virtual students, a dedicated elective art class will be offered on a weekly basis. This class will be mandatory for all virtual students, ensuring that they have the opportunity to engage in an art education.</p>

### 3. GOALS

GOAL DESCRIPTION	KEY BENEFITS
<p>1) Hire a full time art teacher to teach the personalized and virtual students</p>	<p><b>Teach Personalized Classes</b>  <b>Grades 6-12</b>                      6-8 - Elective Art class on the ETL schedule                      9-12 - ETL Integrated Visual and Performing Arts 10-credit class to meet the A-G "F" VAPA category and the VAPA graduation requirement</p> <p><b>Grades K-5 (Virtual and Elementary Personalized Paths)</b>                      Create a <i>Meet the Masters</i>, or a similar program, to captivate the younger audience</p>
<p>2) Hire a full time (possibly part time depending on number of offered classes) music teacher to teach the personalized and virtual students</p>	<p><b>Teach a middle school/high school music appreciation class</b>                      Foster an appreciation for varying music genres, compositions, and composers through exposure and education</p> <p><b>Teach introductory general music classes to various age groups K-8</b>                      Teach basic music theory: notation, rhythm, pitch, dynamics, etc,                      Foster an appreciation for varying music genres, compositions, and composers through exposure and education.</p>

## 4. SCOPE OF WORK

The Art and Music teachers' weekly responsibilities will include but not be limited to:

Creating and developing lessons plans which adhere to state standards

Delivering weekly, live, and online art & music classes

Providing constructive feedback to students weekly

Recording daily attendance

Grading weekly student assignments

Communicating with virtual teachers and Teachers of Record to share student progress

Communicating with parents regarding any student concerns

Providing a variety of differentiated strategies to support all learners

Sharing end-of-semester grade reports with virtual teachers and Teachers of Record

Developing and designing a junior high elective art and/or music wheel

Developing in-person art and music community opportunities



## 5. DELIVERABLES

DESCRIPTION	NOTES
Showcase monthly art and music projects	
Showcase the relationship between art/music and "real world" opportunities	
Share College and Career post-grad art and music options	

## 6. TIMELINE / MILESTONES

<p>March - Advertise the job descriptions and begin the hiring process for full time art and music teachers</p> <p>April /May - Interview and hiring process</p> <p>June/ July - Begin contract and program planning and implementation for the 24-25 school year</p> <p>August - New Teacher training process with each respective program administrator</p>
---

## 7. STAFFING RESOURCES

<p>Overview ...</p> <p>Virtual curriculum for all virtual classes</p> <p>Middle and High School curriculum for Excel Teacher Led classes</p> <p>Teacher art and music supplies for demonstrations</p> <p>Art &amp; music supply lists</p>
---

JOB TITLE	REQUIREMENTS (Credential)	FTE
Virtual Art Teacher	Single Subject Art Credential / Multiple Subject Credential	1
Virtual Music Teacher	Single Subject Music Credential/ Multiple Subjects	.5

## 8. MEASUREMENTS OF SUCCESS

### 8.1 PROGRESS EVALUATION METHODS

Surveys - Student interest, participation and progress, etc.

Student work samples

Teacher feedback

Evaluation of teachers by the Education Department

Administrative formal new-teacher observation process

### 8.2 REPORTING METHOD + SCHEDULE

Teacher mid-year and end of the year performance reviews and observations

Evaluate the progress of the program and address potential improvements for the 25-26 school year

# Proposition 28: Arts and Music in Schools Funding Annual Certification Requirements

Name: Excel Academy Charter  
CDS Code: 3667736-0139576  
Charter School Number: 2073  
Allocation Year: 2024-25

As a condition of receipt of funds pursuant to [Chapter 5.1 of Part 6 of Division 1 of Title 1 of the Education Code \(EC\)](#) (Section 8820 et seq.), subdivision (g) of EC Section 8820 requires a local educational agency to annually certify to the following:

(1) Certify that all Arts and Music in Schools funds received in the current fiscal year will be used to provide arts education programs, and that Arts and Music in Schools funds expended in the prior fiscal year were, in fact, used for those purposes, except as provided in paragraph (3). For local educational agencies with an enrollment of 500 or more pupils, the certification shall also ensure that at least 80 percent of funds to be expended will be used to employ certificated or classified employees to provide arts education program instruction and that the remaining funds will be used for training, supplies and materials, and arts educational partnership programs unless waived pursuant to subdivision (h) of EC Section 8820.

(2) Certify that such funds received in the current fiscal year will be used to supplement funding for arts education programs and that funds expended in the prior fiscal year were, in fact, used to supplement arts education programs.

(3) Certify that no more than 1 percent of funds received in the current fiscal year will be used for a local educational agency's administrative expenses to implement this chapter and that funds received in the prior fiscal year were, in fact, used within that limit.

**By checking this box, the submitting local educational agency certifies to meeting the requirements of EC Section 8820(g)(1) through (3), as outlined above.**

**Submission Date**                      6/5/2025 1:59:53 PM

# Proposition 28: Arts and Music in Schools Funding Annual Certification Requirements

Name: Excel Academy Charter  
CDS Code: 3775416-0139386  
Charter School Number: 2053  
Allocation Year: 2024-25

As a condition of receipt of funds pursuant to [Chapter 5.1 of Part 6 of Division 1 of Title 1 of the Education Code \(EC\)](#) (Section 8820 et seq.), subdivision (g) of EC Section 8820 requires a local educational agency to annually certify to the following:

(1) Certify that all Arts and Music in Schools funds received in the current fiscal year will be used to provide arts education programs, and that Arts and Music in Schools funds expended in the prior fiscal year were, in fact, used for those purposes, except as provided in paragraph (3). For local educational agencies with an enrollment of 500 or more pupils, the certification shall also ensure that at least 80 percent of funds to be expended will be used to employ certificated or classified employees to provide arts education program instruction and that the remaining funds will be used for training, supplies and materials, and arts educational partnership programs unless waived pursuant to subdivision (h) of EC Section 8820.

(2) Certify that such funds received in the current fiscal year will be used to supplement funding for arts education programs and that funds expended in the prior fiscal year were, in fact, used to supplement arts education programs.

(3) Certify that no more than 1 percent of funds received in the current fiscal year will be used for a local educational agency's administrative expenses to implement this chapter and that funds received in the prior fiscal year were, in fact, used within that limit.

**By checking this box, the submitting local educational agency certifies to meeting the requirements of EC Section 8820(g)(1) through (3), as outlined above.**

**Submission Date**                      6/5/2025 2:02:28 PM

# Coversheet

## Approval of Superintendent/CEO Goals for 2025-2026

**Section:** X. Personnel Services  
**Item:** A. Approval of Superintendent/CEO Goals for 2025-2026  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Superintendent\_CEO Goals - 25\_26.pdf



**GO FOR  
GOLD**

***SUPERINTENDENT/CEO***

**GOALS & PROGRESS**

**2025—2026**

**03** CPSEL STANDARDS

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**04** SUPERINTENDENT'S ROLE

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**5-14** SUPERINTENDENT'S GOALS

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**15** BOARD GOALS

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**16** EVALUATION TEMPLATE

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# TABLE OF CONTENTS

# CPSEL STANDARDS

## STANDARD 1

Development and Implementation of a Shared Vision

## STANDARD 2

Instructional Leadership

## STANDARD 3

Management and Learning Environment

## STANDARD 4

Family and Community Engagement

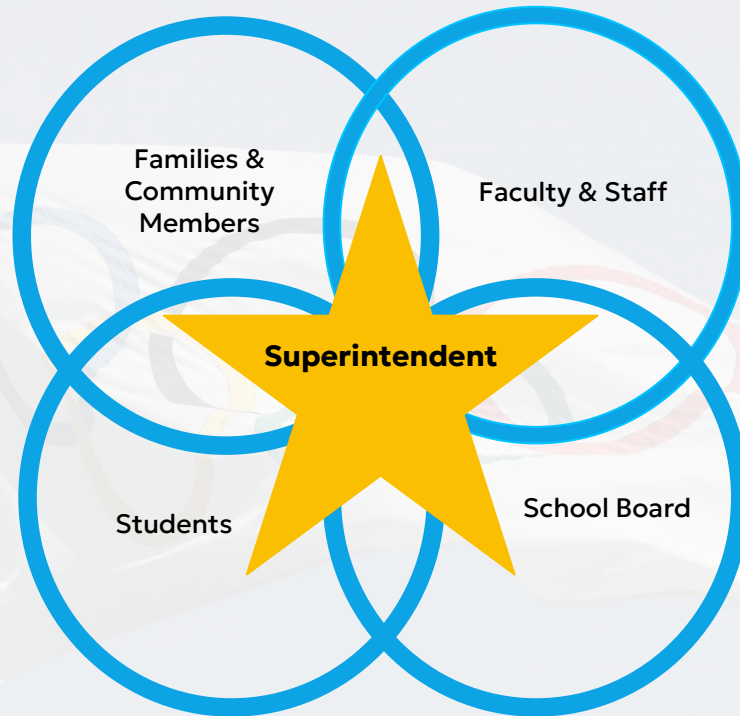
## STANDARD 5

Ethics and Integrity

## STANDARD 6

External Context and Policy





# Priority/GOAL 1:


## Professional Development

I will take an active role in analyzing professional development priorities and making recommendations for each department as well as the goals and objectives of the All Staff meetings. I will ensure the professional development goals of the department Directors and leads align with the school goals and local indicators as outlined in the LCAP incorporating AI and being conscientious of 21st century skills, access and use of technology. I commit to being intentional about the overall outcomes of professional development through analyzing staff satisfaction surveys and how PD content affects student achievement.



CPSEL Standard 2

# STAFF PD - AI Augmentation for Educators



### Staff Use of AI - Survey

Hello staff!

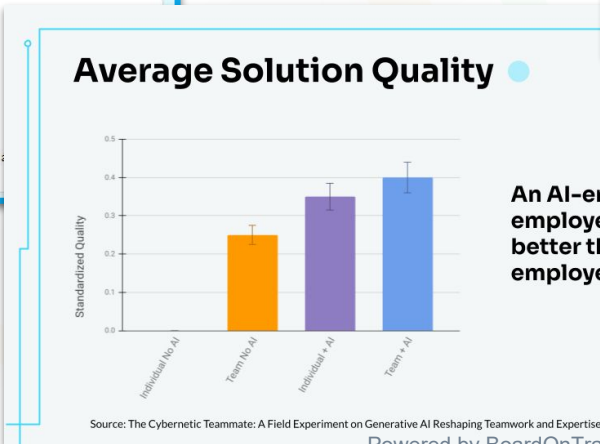
Please take a quick moment to complete this survey--the data will be used for a presentation at the All Staff PD in August.

\*\*\*Please complete no later than August 13\*\*\*

\* Indicates required question

How much experience do you have with AI? \*

- I know what it is but I never use it
- I use it occasionally
- I use it almost daily in the workplace
- A and I are two letters in the alphabet and that's as far as I go




An AI-enhanced employee performs better than employees without AI.



## Torchbearers of Innovation:

Lighting the Way with AI in Your Role

### The AI Augmentation Spectrum



- Perception**  
AI helps detect patterns in student data that might go unnoticed, such as identifying students who may be struggling before they fall behind.
- Situational Awareness**  
Gain broader insights into classroom dynamics, student progress, and educational trends.
- Prevention**  
Proactively address potential issues before they become problems through early warning systems.
- Prediction**  
Anticipate student needs and outcomes based on historical data and current performance trends.
- Automation**  
Delegate routine tasks like grading multiple-choice assessments, formatting documents, and organizing resources.
- Suggestion**  
Get personalized recommendations for learning resources, differentiation strategies, and lesson plan enhancements.
- Notification**  
Receive alerts about important deadlines, student behavior changes, or necessary interventions without constant monitoring.

**Offering engaging, timely, and relevant weekly mini professional development sessions for staff throughout the year. Topics include:**

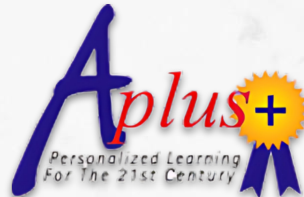
- **Curriculums by style**
- **Tier 1 Interventions**
- **Teacher Tech & Organization**
- **G-Suite Tips & Tricks**
- **Time Management**



# Professional Development Associations



California  
Charter Schools  
Association



# Priority/GOAL 2:

## Quality Programs

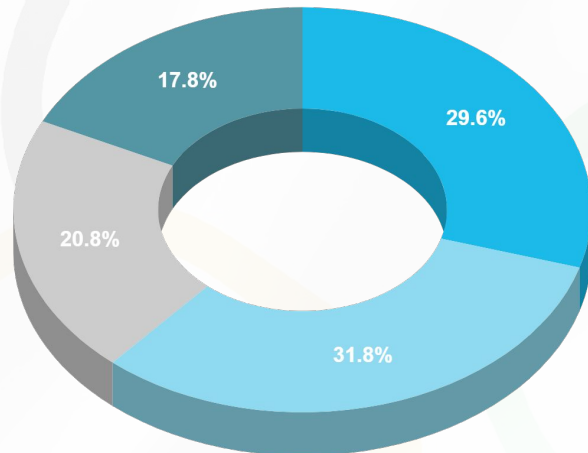
I will work to maintain an effective balance of my time and resources spent between understanding and advocating for charter education policy while being proactive and compliant with daily operations and programming as the Superintendent of Excel Academy Charter School. I will facilitate and initiate effective and positive relationships with all educational stakeholders specifically our authorizing district and the new Helendale Superintendent all while keeping a pulse on school culture and data driven metrics for student achievement.



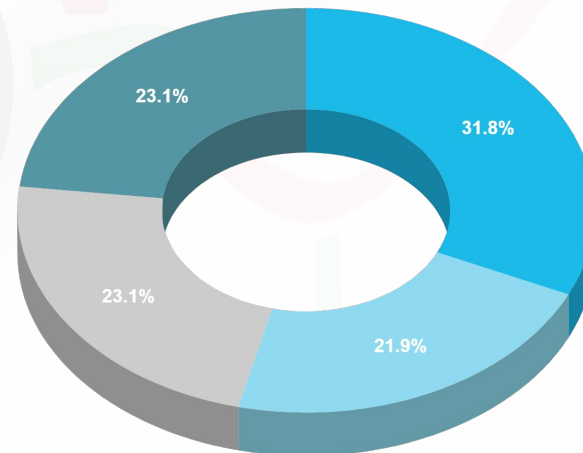
CPSEL Standard 6

- Standard Exceeded
- Standard Met
- Standard Nearly Met
- Standard Not Met

# CAASPP Results 2025



ELA Results



Math Results

## 2023/24 to 2024/25

61% of student met or exceeded ELA standards =  
**3% increase from 23/24**  
54% of students met or exceeded math standards =  
**4% increase from 23/24**

# Board & Authorizer Relations





# Priority/GOAL 3: Sustainable Growth

I will work closely with the Director of Business Services to spend down all remaining one time funds with 2025-26 deadlines and ensure proper allocation of block grants and categorical funds while maintaining a reserve in preparation for deferrals in June 2026. I will act proactively to analyze and prepare for the fiscal and audit requirements of pending legislation per AB84 and SB414.



CPSEL Standard 3

# CHARTER SCHOOL ADVOCACY IN ACTION

**AB 84**  
UPDATE

July 10, 2025

**Dear Excel Academy Community,**

While we're enjoying a well-earned summer break, lawmakers in Sacramento are still at work – and they're pushing forward a bill that could seriously impact our schools.

**Assembly Bill 84** claims to fight fraud, but what it really does is bury school funding in red tape and unfunded mandates. If passed, it could mean **more money in red tape and unfunded mandates. If passed, it could mean more money in red tape and unfunded mandates.**

**paperwork and bureaucracy – and less on teachers, classrooms, and kids.**

We all support transparency and accountability in public education – but **AB 84** is a bad idea.


The good news? It's not too late to make a difference. **AB 84** will be heard by the **California State Senate Education Committee in Sacramento on July 10th** and heads to the full Senate for a final vote.

Please take two minutes right now to learn more from our partner, Schools Development Center.

<https://chartercenter.quorum.us/campaign/115259/>

Thank you for your continued leadership and commitment to providing a student-centered, flexible public school options in California. With appreciation.

**Sincerely,**  
The Excel Academy Administration



**DIANE DIXON**  
72ND ASSEMBLY DISTRICT

**SAVE OUR SCHOOLS  
TOWN HALL**

➔ Hear from Assemblymember Dixon and Heidi Gasca on pending legislation

➔ Learn what you can do to support your schools and stop AB 84

➔ Bring your friends & stop this bill! Students welcome

**RSVP**



**Superintendent and CEO of Excel Academy Charter School**  
Heidi is a respected voice in the charter school community. She serves on the APPlus+ Advisory Council and is a member of ACSA Region 18. In addition, she actively contributes to charter school development and advocacy through CSDC and CCSA.




**Friday, July 18**  
**3 PM - 4:30 PM**

Laguna Hills Community Center  
25555 Alicia Pkwy,  
Laguna Hills



# GROWTH AT EXCEL

01

## 2056 STUDENTS

20% growth from August 2024  
to August 2025

663 NEW  
1424 Returning

69% retention rate

02

## 140 STAFF MEMBERS

12% increase from 2024-2025

*Hiring need derived from large  
increase in student enrolment*

- 17 NEW
- 123 Returning

88% retention rate

03

## CATEGORICAL FUNDS

**Educator Effectiveness Block Grant  
(EEBG)** - \$164,182 Remaining  
(ending June 2026)

**Expanded Learning Opportunities  
(ELO) Grant** - Fully expended as of June  
2025. New funding allocated in the  
2025/26 budget

**Arts & Music Block Grant** - \$401,039  
remaining  
(ending June 2026)

**Learning Recovery Grant** - \$492,042  
(ending June 2028)

# BOARD GOALS

From 24/25 Board Eval:

## **Technology Proficiency**

*Ensure all board members are proficient in using computer skills to prevent meeting delays and avoid potential violations of the Brown Act when communicating with the entire board.*

## **Succession Planning**

*Periodically review and update the superintendent succession plan to ensure a smooth transition of leadership in case of a leave of absence.*

## **Collaborative Leadership**

*Continue to work collaboratively with the leadership team to achieve school-wide goals.*

# 2025/26 Excel Academy Charter Schools *Superintendent Evaluation Template*

 [Click Here](#) 

# Coversheet

## Ratification of ClassPass for Excel Academy Charter School Staff for 2025-2026 (Renewal)

**Section:** X. Personnel Services  
**Item:** B. Ratification of ClassPass for Excel Academy Charter School Staff for 2025-2026 (Renewal)  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Excel Academy Charter School & ClassPass Agreement\_completed.pdf

### BACKGROUND:

ClassPass is a corporate wellness benefit that gives employees flexible access to a network of fitness studios, gyms, and wellness services through a single monthly subscription. Unlike traditional gym memberships, this program allows employees to choose from a wide variety of activities—including yoga, cycling, strength training, and meditation—at different locations, catering to diverse preferences and schedules. Excel Academy Charter School provides a credit subsidized as a benefit to promote employee well-being, reduce stress, and improve morale, which in turn can lead to higher productivity and talent retention. The cost of this offering is covered through a benefit rebate offered by our benefits broker and carriers.

### RECOMMENDATION:

It is recommended that the Board approve the renewal of ClassPass for Excel Academy Charter Schools.



**CORPORATE WELLNESS PROGRAM ORDER FORM**

**CORPORATE PARTNER DETAILS**

**Excel Academy Charter School**  
 1 Technology Drive  
 Suite i-811, Irvine, CA, 92618, US

contact: Megan Anderson  
 email: manderson@excelacademy.education

**Bill to:**  
 Legal Entity Name: Excel Academy Charter School

Billing Address: 1 Technology Drive, Suite i-811 Irvine CA 92694  
 billing contact: Megan Anderson  
 email: manderson@excelacademy.education  
 VAT/Tax ID:

**INITIAL PROGRAM TERM**

<b>Start Date</b>	9/2/2025
<b>End Date</b>	9/2/2026

**PROGRAM FEES (if applicable)**

Corporate Partner Fee Category	Price
Global Program Fee (Monthly)	\$185.00USD

**PARTICIPANT PLAN OFFERINGS**

Participant Plan	Region	Subsidy billed to Corporate Partner
13 Credit Plan (includes 20% additional credits)	59 - United States	\$29.00 USD / Month
28 Credit Plan (includes 20% additional credits)	59 - United States	\$29.00 USD / Month
45 Credit Plan (includes 20% additional credits)	59 - United States	\$29.00 USD / Month
91 Credit Plan (includes 20% additional credits)	59 - United States	\$29.00 USD / Month

**CONFIDENTIAL**

*Participants select an individual membership plan and will pay ClassPass the listed rates on the Partner’s landing page to purchase credits under the Program.*

**ADDITIONAL TERMS**

This Order Form is governed by the ClassPass Corporate Program Terms and Conditions found at <https://classpass.com/corporate-wellness/program-agreement/terms> (the “**Terms**”) (the Terms and the Order Form, collectively, the “**Agreement**”). The Program described in this Order Form is provided under and subject to the Terms, except as expressly modified by this Order Form. Capitalized terms used but not defined in this Order Form shall have the meanings ascribed to them in the Terms.

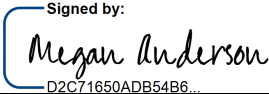
Prices are listed in the applicable currency and exclude any applicable taxes.

All payment obligations under this Agreement are non-cancelable and all fees paid are non-refundable.

This Order Form supersedes all prior and contemporaneous understandings, agreements, representations, and warranties, both written and oral, with respect to the services set forth herein, including, but not limited to, any prior Order Forms executed between the Parties.

By signing below, you are acknowledging that you have read and accepted the Agreement and you are an authorized representative of the Corporate Partner.

**ACCEPTED:**

Signature:  Signed by: Megan Anderson  
D2C71650ADB54B6...

---

Name: Megan Anderson

---

Title: Director of Human Resources


---

Date: 7/28/2025

---

**ACCEPTED:**

**ClassPass, LLC**

Signature:  Signed by: Cate Donovan  
34DF4E0DD3A9460...

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Name: Cate Donovan

---

Title: VP, Corporate

---

Date: 7/28/2025

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Order: 006PA00000GASoDYAX