AIMS K-12 College Prep Charter District

Finance Committee Monthly Meeting

Date and Time

Thursday May 14, 2020 at 7:30 AM PDT

Location

Zoom Meeting

AIMS does not discriminate on the basis of disability in the admission or access to, or treatment or employment in, its programs or activities. Marisol Magana has been designated to receive requests for disability-related modifications or accommodations in order to enable individuals with disabilities to participate in open and public meetings at AIMS. Please notify Marisol Magana at (510) 220-9985 at least 24 hours in advance of any disability accommodations being needed in order to participate in the meeting. **All comments and questions should be entered into the chat feature of the Zoom meeting.**

Join Zoom Meeting https://us02web.zoom.us/j/87086078199?pwd=UytpNENKazRIOStLRWR0bTVGZ1JaZz09
Meeting ID: 870 8607 8199 Password: 3wrGPs

Agenda

		Purpose	Presenter	Time
I.	**Opening Items**			**7:30 AM**
	Opening Items			
	A. Call the Meeting to Order			

		Purpose	Presenter	Time
B.	Record Attendance and Guests			2 m
C.	Public Comment on Non-Action Items			10 m

Public Comment on Non-Action Items is set aside for members of the Public to address the items on the Committee's agenda prior to each agenda item. The Committee will not respond or take action in response to Public Comment, except that the Committee may ask clarifying questions or direct staff. **Comments are limited to two (2) minutes per person, and a total time allotted for all public comment will not exceed twenty (20) minutes (10 minutes per section).**

D.	Public Comment on Action Items			10 m

Public Comment on Action Items is set aside for members of the Public to address the items on the Committee's agenda prior to each agenda item. The Committee will not respond or take action in response to Public Comment, except that the Committee may ask clarifying questions or direct staff. **Comments are limited to two (2) minutes per person, and a total time allotted for all public comment will not exceed twenty (20) minutes (10 minutes per section).**

II.	**Non-Action Items**			**7:52 AM**

-Committee Scheduling Discussoin

A.	Projected Budget Cuts	Discuss	Katema Ballentine	15 m
B.	2020-2021 Salary Freeze Discussion	Discuss	Maya Woods-Cadiz	10 m
C.	SELPA Discussion	Discuss	Katema Ballentine	15 m
D.	Review Audit Trail	Discuss	Katema Ballentine	10 m
III.	**Action Items**			**8:42 AM**
A.	Covid-19 Funding Options	Vote	Katema Ballentine	10 m
B.	Purchase of PPE Equipment	Vote	Chris Edington	10 m
C.	Covid-19 Reimbursement Stipend	Vote	Katema Ballentine	10 m

		Purpose	Presenter	Time
D.	Vent Protection Service	Vote	Marisol Magana	10 m

IV. Closed Session — 9:22 AM

A. Public Comment on Closed Session Items — FYI — 10 m

Public Comment on Closed Session Items is set aside for members of the Public to address the items in this section prior to closed session. The Committee will not respond or take action in response to Public Comment, except that the Committee may ask clarifying questions or direct staff. **Comments are limited to two (2) minutes per person, and a total time allotted for all public comment will not exceed twenty (20) minutes (10 minutes per section).**

B. Recess to Closed Session — FYI

Closed Session Items:

1. Conference with Real Property Negotiators
   (Gov. Code Section 54956.9)

2. Conference with Legal Counsel - Anticipated Litigation
   (Gov. Code Section 54956.9)

C. Reconvene from Closed Session — Vote — 2 m

Roll Call

D. Report from Closed Session — FYI — 3 m

V. Closing Items — 9:37 AM

A. Items For Next Agenda — FYI

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-
-
-

B. Adjourn Meeting — Vote

		Purpose	Presenter	Time
C.	NOTICES	FYI		

The next regular meeting of the Board of Directors is scheduled to be held May 19, 2020, @ 6:30 pm. AIMS does not discriminate on the basis of disability in the admission or access to, or treatment or employment in, its programs or activities. Marisol Magana has been designated to receive requests for disability-related modifications or accommodations in order to enable individuals with disabilities to participate in open and public meetings at AIMS. Please notify Marisol Magana at (510)220-9985 at least 24 hours in advance of any disability accommodations being needed in order to participate in the meeting.

I, _____ hereby certify that I posted this agenda at the AIMS Campus 171 12th street, Oakland, CA 94607 on, _____, at _____ PM.
Certification of Posting

Coversheet

Projected Budget Cuts

Section:	II. Non-Action Items
Item:	A. Projected Budget Cuts
Purpose:	Discuss
Submitted by:	
Related Material:	Finance Committee Projected 15% Budget Cut.docx Projected Budget Cuts 15% Scenerio.pdf

MEMORANDUM

TO: Finance Committee
FROM: Katema Ballentine, Business Office
DATE: May 14,2020
SUBJECT: 2020-21 Projected Budget Cut 15% Scenario

The information below reflects a projected 15% decrease among all salary sources. Reductions among State and Federal revenues are based upon suggested guidelines. The local revenues were based on the uncertainty of student activity based revenues.

American Indian Public Charter School

Budget Summary

SAC	Code	Description	Current Year 2019-20	2020-21 (-) 15%	Variance @ 15%
Revenue					
		State	1,678,312	1,426,565	(251,747)
		Federal	206,260	175,321	(30,939)
		Local	34,209	29,078	(5,131)
	Total Revenue		**$ 1,918,781**	**$ 1,630,964**	**$ (287,817)**

Preliminary projection: AIPCS will lose approximately $287,817 in revenues

American Indian Public Charter School II

Budget Summary

SAC	Code	Description	Current Year 2019-20	2020-21 (-) 15%	Variance @ 15%
Revenue					
		State	8,104,083	6,888,471	(1,215,612)
		Federal	463,083	393,620	(69,462)
		Local	66,490	56,517	(9,974)
	Total Revenue		**$ 8,633,656**	**$ 7,338,608**	**$ (1,295,048)**

Preliminary projection: AIPCS II will lose approximately $1,295,048 in revenues

American Indian Public Charter High School					
Budget Summary					
			Current Year		
	SAC	Code Description	2019-20	2020-21 (-) 15%	Variance @ 15%
Revenue					
		State	5,268,233	4,477,998	(790,235)
		Federal	105,071	89,310	(15,761)
		Local	116,872	99,341	(17,531)
	Total Revenue		$ 5,490,176	$ 4,666,650	$ (823,526)

Preliminary projection: AIPHS will lose approximately $823,526 in revenues

*These numbers are based on current year enrollment data and are subject to change. Projected 2020-21 enrollment data will be updated by the June Finance Committee Meeting.

AIMS Board Meeting Item Cover Letter

Item: 2020-21 Projected Budget Cuts 15% Senerio

Presented By: Katema Ballentine

Staff Recommendation:

Review the 2020-21 Projected Budget Cuts. This outline reflects preliminary revenue reductions of 15% based of the current year data.

Committee Approval: Finance Committee

Total Associated Cost: 0

Included in Budget? Yes

Over or Under Budget?

Amount Over/Under Budget?

Included in LCAP? N/A

Which LCAP?

Coversheet

2020-2021 Salary Freeze Discussion

Section: II. Non-Action Items
Item: B. 2020-2021 Salary Freeze Discussion
Purpose: Discuss
Submitted by:
Related Material: 2020 21 Salary Freeze.pdf

AIMS Board Meeting Item Cover Letter

Item: 2020-2021 Salary Freeze

Presented By: Katema Ballentine

Staff Recommendation:

The projected 2021-2020 fiscal year will be challenging. Deferrals of State and Federal revenues are projected for the upcoming year. In order to maintain fiscal solvency the AIMS Chief of Business request the approval of a salary freeze for the 2020-21 school year.

Committee Approval: Finance Committee

Total Associated Cost:

Included in Budget? N/A

Over or Under Budget?

Amount Over/Under Budget?

Included in LCAP? N/A

Which LCAP?

Coversheet

SELPA Discussion

Section: II. Non-Action Items
Item: C. SELPA Discussion
Purpose: Discuss
Submitted by:
Related Material: El Dorado Charter SELPA Information.docx
CCSA Special Education Toolkit.pdf
Intent to Leave SELPA AIPHS.docx
Intent to Leave SElpa AIPCS II.docx
Intent to Leave SElpa AIPCS.docx
SELPA Discussion.pdf

El Dorado Charter SELPA

The 2019-20 application process for membership beginning July 1, 2020 is a seven-stage process beginning with the Potential New Partner Meetings.

1. **Potential New Partner Meetings**
   Mandatory attendance by a school's CEO is required. This meeting outlines the services provided by the Charter SELPA, what is expected as a new charter partner within the Charter SELPA, as well as the application process.

   Please Note: If your application is considered an expansion of a current partnership, you are not required to attend a Potential New Partner Meeting. When you register your email on the application website make sure you indicate which of our current partners you are a member of.
2. **Stage 1**
   Completion of the online initial application packet, fiscal information and submittal of required documentation.
3. **Stage 2**
   Completion of the program portion of the application and submittal of required documentation. Followed by an internal review by the SELPA and selected charter partners.
4. **Due Diligence** – Concurrently to stage 3 a due diligence review will take place.
5. **Capacity Interview**
   This interview will allow the Charter SELPA to understand the overall culture of your charter and your leadership vision for serving students with special needs.
6. **Selection Committee**
   The SELPA Selection Committee determines the final approval of recommended applicants.
7. **New Partner Induction**
   Mandatory attendance at a New Partner Induction Meeting is required. This meeting discusses the mutual commitment between the SELPA and new partners.

Applications for Cohort 2 will open for the 2020-21 school year on March 17, 2020

To be eligible to apply attendance is required at our Potential New Partner Meeting being held

Monday, March 16, 2020, in Long Beach.

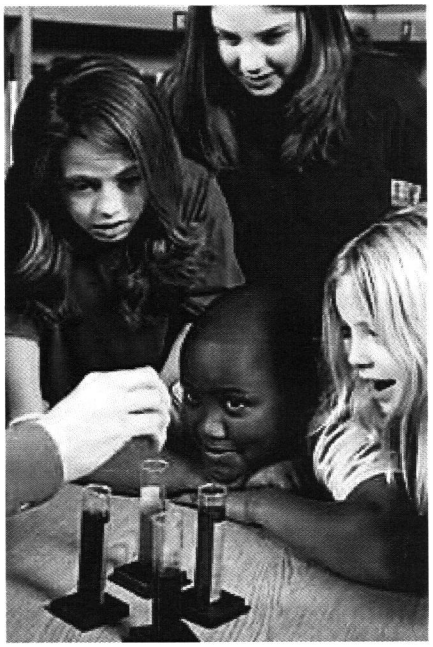
If you have any questions, **please contact Kelly Carnahan at kcarnahan@edcoe.org.**

Please note, if you are currently in operation, per Ed. Code, and to avoid any difficulty should you choose to join another SELPA, notice should be provided to your current SELPA one year and one day in advance of the school year you intend to leave (i.e., June 30, 2019 for the 2020-21 school year). We advise providing notice of intent to withdrawal to your authorizer, current SELPA, and CDE. If you do not provide this notice before the June 30 deadline, you would need to acquire a letter of agreed upon early release from your SELPA.

The importance of this communication is to ensure sufficient planning time for all involved and is required by law. Our process will require evidence of timely communication. We recommend sending these letters by certified mail with return receipt.

CCSA

California Charter Schools Association



SPECIAL EDUCATION TOOLKIT

Understanding the Options Available When Accessing Special Education Services for Students in Charter Schools

WHAT'S INSIDE:

- Special Education Structures in California
- Special Education Options for Charter Schools
- Evaluating Your School's Needs
- Seeking LEA Status and Membership in a New SELPA
- Sample Documents

Prepared by the California Charter Schools Association

Summer 2015

INTRODUCTION

Aware of the many challenges charter schools face when planning to serve students with special education needs, the California Charter Schools Association (CCSA) has created this toolkit to guide our membership toward viable options available across the state. Inside this document, you will find valuable information, including:

- Background on the special education issues a new charter might face, and recent progress to address these issues;
- An outline of the different special education options that may be available to your school
- Factors to consider when weighing these options
- Specific steps required for your school to join a new Special Education Local Plan Area (SELPA);
- Tools to help you put these steps into action



For Further Information

While we believe this document will provide most of the assistance you need, please feel free to contact the Association with inquiries. You may contact the Help Desk (info@calcharters.org) or your Regional Advocacy representative:

- Laura Kerr, Sacramento (lkerr@calcharters.org)
- Jeff Sands, Fresno/Central Valley (jsands@calcharters.org)
- Hilary Harmssen, San Francisco Bay Area (hharmssen@calcharters.org)
- Adan Lupercio, Santa Clara County (alupercio@calcharters.org)
- Sarah Angel, Los Angeles Area (sangel@calcharters.org)
- Ebony Wheaton, Los Angeles Area (ewheaton@calcharters.org)
- Allison Hendrick, Los Angeles Area (ahendrick@calcharters.org)
- Cassy Horton, Los Angeles Area (chorton@calcharters.org)
- Miles Durfee, Southern California (mdurfee@calcharters.org)
- Fátima Cristerna Adame, Inland Empire (fcadame@calcharters.org)

BACKGROUND

Before stepping into the toolkit itself, you should first understand the history regarding special education in charter schools.[1] If you need a refresher on the Individuals with Disabilities Education Act (IDEA), the federal legislation which guarantees all children with disabilities access to a free, appropriate, public education please see CCSA's resources on IDEA and also the Special Education Process.

Across the state, charter schools have voiced concerns regarding special education. Most of these concerns stem from the inability of charter schools to receive their share of state and federal special education funds, have flexibility in the way services are delivered, have control over service delivery, and have a say in the governance or decision-making affecting their school.

Special Education Structures in California

The state of California has a unique structure for funding and delivering services for students with disabilities. In 1977, as part of California's Master Plan for Special Education, all school districts and county offices of education were mandated to form consortiums in geographical regions in order to develop a special education service delivery system for their region. A region might be a group of many small districts or a large single

[1] If you need additional background about how special education functions in California, first reference Appendix A.

district, but each region must be of sufficient size and scope to provide the full continuum of services for children and youth residing within the region boundaries. The service regions were named Special Education Local Plan Areas (SELPAs). There are now approximately 135 SELPAs carrying out the spirit and mandate of the California Master Plan for Special Education.

State and federal funding for special education flows through the SELPAs, who act as the administrative unit. Each SELPA develops a plan for allocating these funds to their member LEAs. Receiving a portion of the SELPA funding, each LEA delivers special education services via a network of in-school personnel, SELPA, district-level resources, and/or contracted private providers.

Like other public schools in the state, every California charter school must be a member of a SELPA. The nature of that membership, however, depends on the identity of that charter school as either (a) a school *of* an LEA or (b) *its own* LEA for purposes of special education.

The following section provides a detailed description of the relationship under each model. For further information, Appendix A provides a graphical summary of the differences between these options in relation to governance, responsibility, and special education funding.

SPECIAL EDUCATION OPTIONS FOR CHARTER SCHOOLS

Under California law, charter schools have two options for the delivery of special education services:

- Operate as an "arm of the district" or "school of the district" (i.e. authorizer) for special education purposes
- Become an LEA (Local Education Agency) for special education purposes

"SCHOOL OF THE DISTRICT" STATUS

What does it mean to be a School of the District?
If a charter school determines that it will remain a "school of the district" they will not become an LEA member of a SELPA. LEA status will remain in the hands of the district and all special education services will be provided by the district, unless agreed to otherwise via an MOU.

District Responsibilities
The district is responsible for ensuring that all special education services are delivered to students of the charter in the same manner as traditional district schools. In most cases, the district will assume full responsibility for providing services to students in the charter schools. In exchange, the district will retain the full amount of state (AB 602) and federal (IDEA) special education funding that it receives from the SELPA on behalf of each charter school. In some instances charters have maintained "school of the district" status with their authorizer but negotiated a MOU which gives more autonomy and funding to the charter school so that it can run part or all of its own special education program. See additional descriptions of innovative arrangements on CCSA's website, particularly the LAUSD Charter Operated program.

Additionally, the California Education Code requires each charter school operating as a school of its authorizer to contribute financially to district-wide special education costs. This contribution is typically referred to as "fair share contribution" or an "encroachment fee." (Educ. Code 47646).

Charter Responsibilities
While the charter school relies primarily on the district to provide special education services, the school still carries certain responsibilities with regard to special education. The school must work with the district to ensure that students are appropriately identified for special education (child find), appropriately referred for assessment (referral), support service delivery of special education services, and implement and monitor the individualized

education plan (IEP) of each eligible student. In most cases, the charter school will not receive any funding to carry out these functions, nor will the charter school have the ability to make decisions about how or by whom services are provided.

"LEA STATUS" FOR PURPOSES OF SPECIAL EDUCATION

As charter schools grow and demonstrate their expertise in serving students with unique needs, a natural progression will be to seek autonomy in funding, oversight, and service delivery in relation to special education services. Under Education Code Section 47641, every charter school in California that provides verifiable, written assurances that the charter school will participate as a LEA in a special education plan approved by the State Board of Education has the right to become an LEA for purposes of special education. The ability to exercise this right depends on language found in the charter petition and any special education MOU with the charter's authorizer. Please see Appendix B for more information on petition language and MOUs. In order to obtain this flexibility, a charter must be an LEA for the purposes of special education by applying and being accepted in either its authorizers' SELPA or a new SELPA.

What does it mean to be an LEA?

Being designated an LEA for special education purposes is equivalent to being treated as a school district. Charter schools receive all state and federal funding as dictated in the SELPA local plan in which they are admitted, in exchange for assuming the full responsibility for providing quality and compliant special education programs and services, while ensuring that all eligible students receive a free appropriate public education (FAPE) as dictated by IDEA. The charter school must, therefore, demonstrate both the programmatic and fiscal capacity to achieve this goal, as well as the infrastructure and experience necessary to operate independently as an LEA.

Please see pages 11 through 17 and Appendix A for more information on special education funding as an LEA.

There are a number of different models that can support a charter school that is seeking LEA status in order to ensure you are able to provide the full continuum of services once you become a LEA member in a SELPA. Currently, there are charter schools that are large enough to provide the full continuum of program options within their own organization. For smaller charter schools, a viable option is to join a consortium of charter schools that would enable the sharing of services among the members.

TOOLKIT

EVALUATING YOUR SCHOOL'S NEEDS

In deciding whether to operate as a school of your authorizing district or seek membership as an LEA in a SELPA, there are several important factors to consider. If you are considering LEA status, the most important question to ask is whether your school has the capacity to independently assess and provide special education and related services to any student—with any type of disability or need—who may enroll in your school.

In deciding whether you are ready to become an LEA for special education, consider the following:

- ✓ Your charter school **must** have procedures for identifying and assessing students for special education.
- ✓ Your charter school **must** have procedures for appropriately referring students for assessments in case of a suspected disability, or upon request from a parent/guardian.
- ✓ Does your charter school have procedures for conducting a full range of special education assessments that are consistent with state and federal laws?
- ✓ Does your charter school have staff, or available by way of contract, credentialed special education teachers and qualified related services providers, for all types of need?
  Some related services that your school may be required to provide include:
  - Resource specialist services
  - Counseling
  - Occupational therapy
  - Physical therapy
  - Speech-language therapy
- ✓ Does your charter school have access to the full continuum of special education placement options?
  Examples of placement options that you may need to secure include:
  - Supplemental aides and services in the general education setting
  - Special education classrooms
  - Non-public schools
  - Home hospital services
- ✓ Does your charter school have a clearly articulated plan for providing transportation to students who may require transportation assistance pursuant to an IEP?
- ✓ Does your charter school have the administrative capacity to conduct Child Find activities, oversee IEP development and implementation, and resolve legal disputes?

MAINTAIN STATUS AS A "SCHOOL OF THE DISTRICT"

If you determine that your school does not yet have the capacity to provide its own special education programs and services, it may make sense for your school to maintain status as a school of your authorizing district while you work toward building the capacity to become an LEA.

Special education Memorandums of Understanding (MOUs) are commonly used to clarify the responsibilities of a charter school and its authorizer for providing special education services to students in the charter school. The special education MOU sets forth each party's specific responsibilities for serving students with disabilities, including responsibilities related to special education staffing and placement, and outlines how the charter school and authorizer will share or allocate the costs associated with special education at the charter school. The specific breakdown of responsibilities and costs may vary depending on the charter school and authorizer. Various provisions in a special education MOU offer advantages and disadvantages. Through our work with charter schools in California, we have determined that a one-size-fits-all approach to drafting a special education MOU is not appropriate.

In preparing to operate as a "School of the District" for special education, consider the following:

- ✓ Your charter school **must** have procedures for identifying and assessing students for special education.
- ✓ Your charter school **must** have procedures for appropriately referring students for assessments in case of a suspected disability, or upon request from a parent/guardian.
- ✓ Your charter school **must** support the delivery of special education services to students with individualized education plans (IEPs).

In this case, there are a number of supports that the Association can offer to assist you in improving your current special education arrangements and preparing to become an LEA:

- ✓ Sample charter petition and MOU language (See Appendix B on page 21)
- ✓ Assistance joining a consortium for special education (ask your Regional Director)
- ✓ Assistance with district negotiations and relations (ask your Regional Director)

SEEKING LEA STATUS AND MEMBERSHIP IN A SELPA

If you determine that it makes sense for your charter school to operate as an LEA for special education, there are several steps you will need to take to secure LEA status. The Association advises that your charter:

1) Notify your current SELPA of an intended exit at least one full year before you intend to exit,
2) Ensure that agreements with your authorizer are conducive to membership in a new SELPA,
3) Weigh the different SELPA options according to the needs of your school and students and
4) Apply to the SELPA(s) that best meet those needs.

Below, you will find more detail and tools to guide you through each of these steps.

Step 1: Notify Current SELPA and Authorizer of Intended Exit

If your school is considering LEA membership in a SELPA, you must notify your current SELPA – either the SELPA in which your school currently participates as an LEA, or the SELPA in which your authorizer participates if you are currently operating as a "school of the district" for purposes of special education– of your

intended exit.[2] The notification must be received by your current SELPA Director and the California Department of Education at least one full year before your intended exit is to be effective (on or before June 30th).

Step 2: Ensure Conducive Special Education Agreements

Special education responsibilities and expectations are typically detailed in special education related agreements—either your charter itself and/or a special education MOU. While the specific language differs from charter school to charter school, from authorizer to authorizer, and from SELPA to SELPA, these agreements usually detail:

- ✓ Your school's role in the delivery of special education services (e.g. school admission practices, intervention services, role in identification and IEP implementation, fee for service options within the SELPA),
- ✓ Financial expectations (i.e. revenue allocation plan and/or contribution to district special education encroachment costs) and
- ✓ Your school's role in the governance and decision-making of the SELPA

Before seeking membership in a SELPA, you must first ensure that these agreements allow for such a move. If they do not allow for your move to a new SELPA, the Association recommends that you seek an amendment to your charter or ensure that your school's MOU will expire or be terminated or modified.

Restrictive Charter or MOU Language

If any of the following are true, you may not be able to join a SELPA until your charter language or your MOU with your authorizer is amended:

- ✓ Your charter/MOU specifies that your school will act as a "school of/within the district" for special education purposes without the option of seeking LEA status in your existing SELPA or another SELPA
- ✓ Your charter/MOU requires that your school receive services from a specific provider (such as your authorizing district/SELPA)
- ✓ Your charter/MOU requires that your school follow procedures of a specific SELPA
- ✓ Your charter/MOU notes that you will be treated just like other district-operated schools regarding special education, without any language that allows you the flexibility to leave the SELPA

Examples of charter language that may need to be amended:

> "The school will seek to operate as a *public school within the District* for special education purposes. As such, the District is entitled to [School's] state and federal special education revenue, as well as an additional encroachment, for providing special education services." (*Excerpt from charter authorized by Oakland Unified)*
>
> "[School] pledges to work in cooperation with the *South East Consortium for Special Education SELPA* to ensure that a free and appropriate education is provided to all students with exceptional needs. …[School] will comply with AB 602, *South East Consortium of Special Education SELPA guidelines*, and all California laws pertaining to special education students." *(Excerpt from a charter authorized by East Side Union High School District in San Jose)*

Ideal Charter Language

In short, you will want to ensure that your special education agreements are as explicit and flexible as possible about providing your school the option to access enhanced special education solutions. Especially in your charter itself, seek broad language. Rather than language that states that your charter must belong to a *specific* SELPA, include language that requires your charter to belong to *a* SELPA.

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[2] A sample notification of exit can be found in Appendix C.

An example of language conducive to alternate options follows:

> "Prior to Los Angeles Unified School District (LAUSD) Governing Board approval, [school] will either execute a Memorandum of Understanding (MOU) by and between the LAUSD and [school] regarding the provision and funding of special education services consistent with the requirements of the LAUSD Special Education Local Plan Area (SELPA) Local Plan for Special Education **or provide approved legal verification of membership in another state approved SELPA….**" *(Excerpt from a charter authorized by Los Angeles Unified School District)*

Step 3: Consider Your SELPA Options

Before you terminate "school of the district" status or leave your current SELPA, you must secure membership as an LEA in a SELPA or an alternate SELPA. In order to ensure that are situated to provide the best possible services for your students with special needs, you should consider several aspects of a SELPA in determining which SELPA will best suit your needs.

The characteristics of a SELPA that will most affect your charter school and, likewise, should most influence your decision include:

- The role your school would have in the governance of the SELPA,
- The services provided by the SELPA to its members, and
- The amount of funding you would receive for special education.

These aspects are described generally below.

NOTE

Your primary reason for leaving your current SELPA should be to improve services to your students

Governance

While governance structures differ from SELPA to SELPA, most SELPAs provide members with an opportunity to participate in the governance and decision-making of the SELPA. In order for this process to work, charter schools would be their own LEA representative or use a structure (such as a consortium or Charter Management Organization) to act as one LEA representing multiple schools. Charter schools may have a weighted or proportionate voice in SELPA-level decisions. As an example, weighting could be done based on the number of students served by the LEA.

Services

While each LEA is responsible for ensuring a full continuum of services is available to its students, some SELPAs provide significant support in completing this continuum. If the SELPA is local, for example, the charter school may be able to receive some special education services from the SELPA. The SELPA may also facilitate agreements between LEAs, other SELPAs, and/or NPAs. Some SELPAs, however, do not provide assistance with services.

Access to Revenue

Funding and access to revenue vary widely from SELPA to SELPA. The existing special education funding model provides funding to SELPAs based on a rate per unit of average daily attendance (ADA). However, each SELPA is funded at a different rate (often referred to as the "base rate"), and each SELPA is afforded the latitude to determine how funds will be allocated its members. Therefore, it is important to consider both the rate at which a SELPA is funded *and* the allocation plan of the SELPA before applying.

To determine the best SELPA for your school's needs, the following factors and related questions should be considered:

1) **Governance Structure**

a. Does the governance structure, as described in the Local Plan, enable your school to have a sufficient voice in the special education decision making that impacts your program?
b. To what extent does the governance structure of the SELPA promote a transparent accounting of costs in exchange for services provided? Does this degree of transparency meet your school's needs?

2) Access to Quality Special Education Services[3]

a. Would this SELPA help your school enhance the quality of its special education services?
b. To what extent would this SELPA require your school to provide its own special education services? Is your school prepared to offer such services?
c. Are there services that your school is unable to provide? Does this SELPA provide the support, or offer you a pathway to the support that you need to make such services available to your students?

3) Access to Sufficient Special Education Revenue

a. Are the revenues available through this SELPA's allocation plan sufficient to ensure quality special education services?

4) Legal/Fiscal Liability

a. To what extent would your school be responsible for special education expenses, especially for serving high-cost, low-incidence students? How would this SELPA support cost efficiency?
b. To what extent would your school bear the ultimate legal liability for special education issues that may arise? What legal supports does this SELPA provide?
c. Is your school ready and able to absorb these liabilities?

5) Potential Barriers to Entry

a. Does anything stand in the way of making this SELPA an option for your school?

Potential SELPA Options

If membership within your current SELPA does not allow your school to best serve the needs of students, alternative SELPA options may be available.

To address some of the factors previously described, three options for SELPA membership are explained in detail below:

1) Join a multi-district SELPA that is approved to accept charter schools as LEA members
2) Join an approved charter-only SELPA
3) Stay connected with CCSA regarding new charter school options, particularly within the LAUSD SELPA

There are a number of SELPAs that now accept charter schools as LEAs for special education. CCSA is continuously working to expand these options across the state. Select examples of SELPAs that currently accept charter schools as LEA members are highlighted below.

OPTION #1: Join a Multi-District SELPA

If you are considering seeking LEA status, you should first evaluate your local SELPA options. These SELPAs will likely be made up of multiple school districts or a combination of school districts, county offices of education, and charter schools. Start by contacting the SELPA in which your authorizer is a member or the SELPA in which you are geographically located. Inquire about their governance structure, special education services and supports, and policies for accepting charter schools as LEA members.

[3] See Appendix D: Special Education Services

If your local SELPA is not designed to accept charter schools as LEA members, or you believe the SELPA will not enable you to provide the best services for your students, you may consider other multi-district SELPA options. Some SELPAs have already shown a greater willingness to work with charter schools, even those from outside their geographic boundaries.

Desert Mountain SELPA

Located in San Bernardino County, Desert Mountain serves several charter schools—both in and outside its geographic boundaries. Those outside its geographic boundaries are High Tech High Charter schools—all located in San Diego County.

Governance
Like school district members, charter schools that are LEA members of Desert Mountain participate in SELPA-level decisions. Each LEA is provided an equal voice on the SELPA governance Board and each advisory committee (i.e. the steering committee, the Finance Committee and the Community Advisory Committee).[4]

Access to Services
While member charter school LEAs are responsible for all necessary services and related costs, the SELPA facilitates this process in the following ways:

- Providing additional revenue for some high-cost activities (e.g. due process, a portion of NPS/NPA costs) via an informal risk pool / insurance fund,
- Brokering rates for nonpublic schools/nonpublic agencies,
- Providing special education-related training, and
- Collaborating with SELPAs where schools are located to contract with them or other local providers.

Access to Special Education Revenue

- *Rate*: As of the second Principal Apportionment for 2014-2015, the SELPA was funded at a base rate of $646 per pupil average daily attendance (ADA).[5] This amount includes both state and federal special education funding.

OPTION #2: Join a Charter-Only SELPA

While the El Dorado County Charter SELPA was the first SELPA in the state to exclusively serve charter schools, the SBE has now approved additional SELPAs to serve charter schools, including Sonoma County Charter SELPA, Los Angeles County Charter SELPA, and Desert Mountain Charter SELPA. Details on the El Dorado County Charter SELPA and Sonoma County Charter SELPA follow.

In addition, the Association is working with key state and local leaders to expand special education options for charter schools through the creation of other state and regional charter SELPA options that may be structured to serve

Questions to Consider:

1. To what extent would these alternate SELPAs meet your school's needs?
2. Would membership in one of these SELPAs enable your school to *better* meet the needs of students?

[4] Rather than every charter school LEA having its own seat on the governance board, a group of charter schools may choose to align their vote behind a single voting entity. For example, High Tech High has opted for one seat on the Board even though it represents several charter LEAs.

[5] All funding rates should be considered an estimate, as rates are subject to change.

charter schools in various regions across that state. More details will be made available as they are developed.

El Dorado County Charter SELPA

The first charter-only SELPA, the El Dorado County Charter SELPA currently serves over 225 charter schools across the state. While many of its member schools were chartered by the State Board of Education (and, thus, had no natural SELPA "home"), membership is *not* exclusive to such schools.

Governance
Charter schools that are members of the El Dorado County Charter SELPA participate in governance in three main ways:

- *Charter Chief Executive Officer (CEO) Council:* Made up of management staff from each LEA, the CEO Council meets regularly to direct and supervise implementation of the Local Plan.
- *Charter Executive Committee:* Made up of member-elected charter leaders from the CEO Council, the county superintendent and SELPA director, the Executive Committee is responsible for adopting SELPA-wide policy.
- *Special Education Steering Committee:* Made up of LEA-designated teachers and administrators, the Steering Committee advises the SELPA director.

Access to Services:
Each LEA member is responsible for *all necessary special education services and related costs.* The SELPA facilitates this process by providing technical assistance and training and working with SELPAs where schools are located to help complete gaps in service.

Access to Special Education Revenue:

- *Rate*: As of 2014-2015 the SELPA is funded at $630 per pupil average daily attendance (ADA). This amount includes both state and federal funding.
- *Allocation Formula:* The Administrative Unit (AU) retains 4-6% of funds for administrative services, as well as an additional 2-5% of remaining funds as a "Set Aside Contribution" during first year of membership.[6]

Sonoma County Charter SELPA

Approved to begin operations July 1, 2012, the Sonoma County Charter SELPA is designed to assist Northern California charter schools located outside the boundaries of Sonoma County that have been unable to develop a "workable" relationship in the area of special education with their authorizer and/or SELPA and are seeking LEA status for special education.

Governance
Charter schools that are members of the Sonoma County Charter SELPA will participate in governance in three main ways:

- *Charter Chief Executive Officer (CEO) Council:* Made up of management staff from each LEA, the CEO Council meets regularly to direct and supervise implementation of the plan.
- *Charter Executive Committee:* Made up of member-elected charter leaders from the CEO Council, the county superintendent and SELPA director, the Executive Committee is responsible for adopting SELPA-wide policy.

[6] The amount of this contribution decreases with each year of membership and will be reimbursed if the LEA chooses to leave after four years of SELPA membership. See El Dorado Charter Application for more detail: http://www.edcoe.org/chelpaapplication/appWelcomeFunding.asp

- *Special Education Steering Committee:* Made up of LEA-designated teachers and administrators, the Steering Committee advises the SELPA director.

Access to Services:
Each LEA member is responsible for *all necessary special education services and related costs.* The SELPA facilitates this process by providing technical assistance and training and working with SELPAs where schools are located to help complete gaps in service.

Access to Special Education Revenue:
The allocation plan for the Sonoma County SELPA closely resembles the methodology used by the El Dorado County Charter SELPA and provides as follows:

- *Rate*: As of 2014-2015 the SELPA is funded at $635 per pupil average daily attendance (ADA). This amount includes both federal and state funding.
- *Allocation Formula:* The Administrative Unit (AU) retains 4-8% of funds for administrative services, as well as an additional 5% of remaining funds as a "Set Aside Contribution" during first year of membership.[7]

OPTION #3: Stay Connected With CCSA Regarding New SELPA Options for Charter Schools
CCSA is continuously working to expand SELPA options available to charter schools. CCSA staff members are engaged in negotiations with school districts, county office of education officials, charter school leaders, and special education experts across the state to develop new special education options that would provide schools with increased flexibility and autonomy for special education.

One option that CCSA has found to be successful is work with your authorizer to become "LEA-like" for purposes of special education. This would require negotiating a MOU with your authorizer where they agree to pass on most or all of the special education funding that they receive for your school, and the school in turn assumes the full legal responsibility and liability for providing special education services. CCSA has successfully negotiated a range of options like this for a number of charter schools, including for all of the charter schools authorized by LAUSD.

If you are interested in learning more, contact your Regional Director or visit our website, at www.calcharters.org, for more information.

Note on SELPA Funding
You may note that the above descriptions include only general information of the SELPA's funding rates and allocation plans. While you can access SELPA funding exhibits here, via the CDE website, in general you should note that funding rates change every year and vary widely from SELPA to SELPA. Funding allocation plans, which dictate the specific amount of funding that each LEA receives from the SELPA, also vary significantly from SELPA to SELPA. In selecting a SELPA, it important to make sure that the amount of funding your school will receive will allow your school to effectively provide for your students.

Additionally, because growth in ADA is funded at a lower rate than decline in ADA at the SELPA level, it is detrimental to both the charter school and the SELPA to frequently change SELPA membership.[8] For this reason, it is critical to select a SELPA that will meet your school's special education needs for the long term.

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[7] The amount of this contribution decreases with each year of membership until it reaches 2% at year four and then remains 2%. The contribution will be reimbursed if the LEA chooses to leave after four years of SELPA membership. See Sonoma County Charter SELPA website for more detail: http://www.charter.sonomaselpa.org/finance-information/

[8] More detailed information on California's special education funding model is included in Appendix A.

Step 4: Apply to a new SELPA

After you have considered all alternatives, you will need to apply to the SELPA(s) that best meets the needs of your school and—specifically—your students with special needs. A brief outline of steps you should take follows:

1. Approximately a year and a half prior to the start of the school year that you would like to join call the SELPA or check the SELPAs website for application periods and due dates for different submissions.
2. Submit a letter to the SELPA that you intend to join at least one year prior to your potential joining.
3. Arrange a meeting/conversation with the SELPA(s) Director that your school is considering.
4. As necessary, clarify:
    a. SELPA membership terms
    b. Application procedures and timelines
    c. Acceptance criteria
    d. Governance structure
    e. Funding allocation plan
5. Submit necessary application documents well before the deadline.

Application Procedures and Documents

Application procedures vary widely from SELPA to SELPA. Some SELPAs currently require an extensive application process, while others require a letter of intent and an interview. These applications, conversations, and visits are intended to ascertain the capacity and the resolve of the charter school applicant to assume responsibility for the provision of special education services for all children with special needs that may enroll in the charter school.

Acceptance Criteria

While the specific acceptance criteria may be different from SELPA to SELPA, most SELPAs are clear that they are not interested in accepting charter schools that want to leave their current SELPA primarily for financial reasons. Instead, the primary reason for the charter school to leave their current SELPA should be a desire for enhanced special education services for students. Also, you may note that non-pilot SELPAs *may* be less interested in serving schools that are *significantly* outside their geographic boundaries.

Finally, it is important to note that even if you have satisfactorily completed all application requirements acceptance into a SELPA is not guaranteed.

APPENDIX A: SPECIAL EDUCATION GOVERNANCE AND FUNDING IN CALIFORNIA

This appendix is intended to provide basic information about the governance and funding of special education in California. It is not intended to be comprehensive. As you consider your options for special education services, you should seek much more detail before proceeding.

What is a SELPA?

In 1977, all school districts and county school offices were mandated to form consortiums in geographical regions to provide for the special education service needs of all children residing within the region. Each region, known as a Special Education Local Plan Area (SELPA), developed a local plan describing how it would structure special education services for eligible students in the region.

While school districts of sufficient size and scope may operate as a single SELPA, the intent of the SELPA model was to allow smaller school districts, county offices of education, and other agencies to coordinate services in order to maximize quality and economic efficiency.

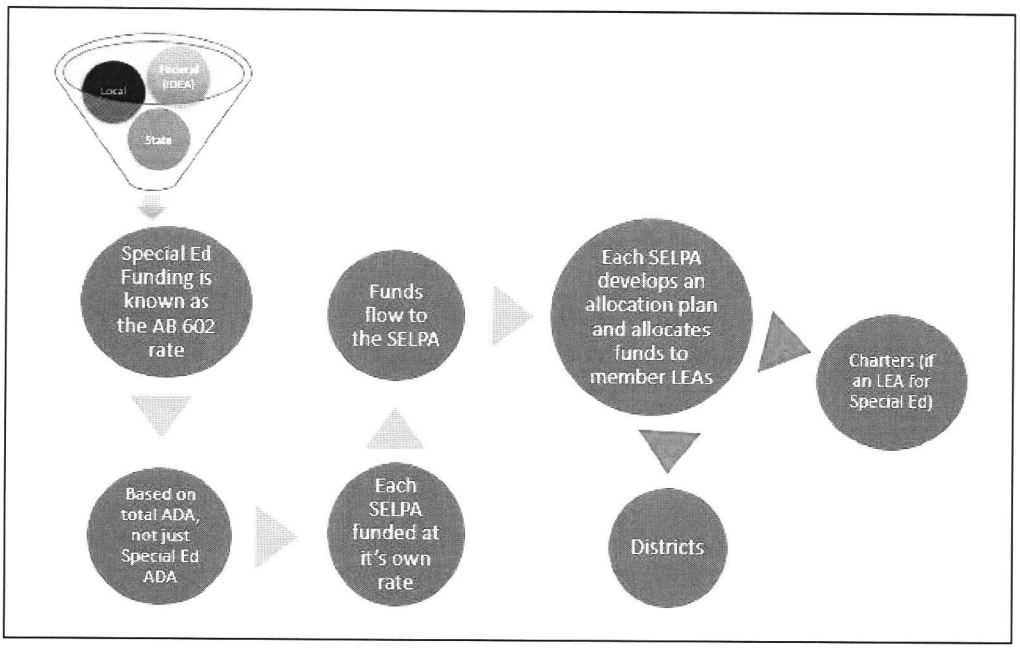
In general, SELPA responsibilities include the following:

- Free appropriate public education (Educ. Code Section 56205(a)(1))
- Full educational opportunity (Educ. Code Section 56205(a)(2))
- Continuous child find and referral (Educ. Code Sections 56205(a)(3) and 56301)
- Individualized education programs (Educ. Code Section 56205(a)(4))
- Least restrictive environment (Educ. Code Section 56205(a)(5))
- Procedural safeguards (Educ. Code Sections 56195.7, 56205(a)(6), 56301(4), and 56836.23(c))
- Annual and triennial assessments (Educ. Code Section 56205(a)(7))
- Transition (Educ. Code Section 56205(a)(9))
- Program coordination
- Assure access to special education for students in the geographic area served by the plan
- Community Advisory Committee (Educ. Code Section 56190)
- Children in private schools (Educ. Code Section 56205(10))

Each SELPA must have an Administrative Unit (the Responsible Local Agency) which is the legal entity that receives funds and is responsible for seeing that every eligible child receives appropriate services. Each SELPA determines how funds will be allocated amongst the member LEAs by developing an allocation plan.[9] Generally, a portion of the revenue is retained by the SELPA to fund administrative tasks and the SELPA might also retain a portion of funds for a risk pool or for any SELPA-wide services. The remaining funds are then passed along to member LEAs to fund their delivery of services to special education students. Each LEA is responsible for providing the full continuum of services to its own students.

The diagram below shows the process by which state and federal funds are allotted and distributed to a multi-district SELPA, who in turn distributes these funds to its member LEAs.

[9] Example of a SELPA allocation plan: https://beehively-websites.s3.amazonaws.com/sites/52381b4f1defc52e29000002/content_entry52565d261defc537cd00269a/5453f57e3e5ac1477b000243/files/Charter_SELPA_Allocation_Plan_2014-15.pdf



Click here for a link to a list of all of the SELPAs in California.

SELPA and Charter School History in California

To become a member of a SELPA, a charter school must be deemed a Local Education Agency (LEA) for purposes of special education. While charter schools can apply to become a LEA in their local SELPA, the power to grant that status lies solely with the SELPA. If LEA status is not granted, the charter may not become a member of that SELPA.

Historically charters found it difficult to attain LEA status with their local SELPA, and they began looking beyond their geographic boundaries for a SELPA that would grant them LEA status. At the time, however, the California Department of Education (CDE) prevented SELPAs from accepting out-of-geographic region charters as members, and required charters to stay in their local geographic areas. This changed in 2007 when the CDE created a pilot program for charter-only SELPAs.

Geographic Pilot & the Creation of Charter-Only SELPAs

In the mid-2000's the California State Board of Education (SBE) decided to study whether geographic proximity to a SELPA was necessary to provide special needs students appropriate special education services. The question raised was whether a charter school, acting as a LEA, could provide a free and appropriate public education (FAPE), as dictated by IDEA, if the charter was a member of a SELPA that was outside the geographic boundary of the charter authorizer's SELPA.

In 2007 the SBE asked the CDE to establish a pilot program allowing 22 out-of-geographic region charter schools to become members of one of four pilot program SELPAs: El Dorado, Yuba County, Lodi Area Special Education Region, and Desert Mountain. The SBE recognized an increasing need by charter schools for alternate SELPA arrangements and clarified that the El Dorado County Charter SELPA, like traditional SELPAs, could now admit new charters based upon its own eligibility criteria.

On January 6, 2010, the SBE determined that the pilot study was successful and that geography was not the most pressing component in an LEA-SELPA relationship. The SBE then removed "pilot status" from the four SELPAs involved with the program.

Given this decision by the SBE, statewide or regional "charter-only" SELPAs may now be established. Once a charter is prepared for LEA status for purposes of special education, it may now apply to join the SELPA that best meets the individual charter school's needs, no matter where it is located in the state.

Charter-SELPA Relationship

Like all other public schools in the state, California charter schools must be a member of a SELPA. The nature of that membership, however, depends on the identity of the charter school as either (a) a school of its authorizer, or (b) its own LEA for purposes of special education. The following chart summarizes the differences between these options in relation to governance, responsibility, and special education funding:

CHARTER SCHOOL AS A SCHOOL OF ITS AUTHORIZER	CHARTER SCHOOL AS ITS OWN LEA
GOVERNANCE	
The LEA authorizer, not the charter school, is the member of the SELPA. The authorizer must represent the charter school in its capacity as the member LEA of the SELPA.	The charter school must apply to and be accepted as a member of a SELPA. While a SELPA "may not treat the charter school differently from the manner in which it treats a similar request made by a district school" (§47645), the SELPA governance council can refuse to accept a charter school as an LEA member.
RESPONSIBILITY	
The charter school must enroll special education students in the same manner that it enrolls other students. Upon enrollment, the LEA authorizer-- not the charter school-- must ensure that all charter students receive special education services that are consistent with their individualized education program and in compliance with all legal requirements.	The charter school must ensure that all of its students with disabilities receive special education services in a manner that is consistent with the individualized education program (IEP) and is in compliance with the law. In order to do so, a charter school must be able to provide a full "continuum of services" for its students.
SPECIAL EDUCATION FUNDING	
The charter school receives special education services in the same manner as provided to other public schools of that LEA. The charter school may enter into an agreement, such as an MOU, with its LEA to change some aspects of service delivery.	Thee charter school receives special education funds and/or services in accordance with the SELPA allocation plan. The charter school participates in the decisions of the SELPA and represents the needs of the students attending their school.

Special Education Funding

The AB 602 Funding Model

California's current special education funding model is based on Assembly Bill 602 (1997-98). This model provides funding to the SELPAs based on a rate per unit of average daily attendance (ADA) as opposed to the actual number of students with special needs. Adjustments are made for decline and growth in enrollment, and SELPAs with above-average incidences of high-cost special education pupils receive additional funding.

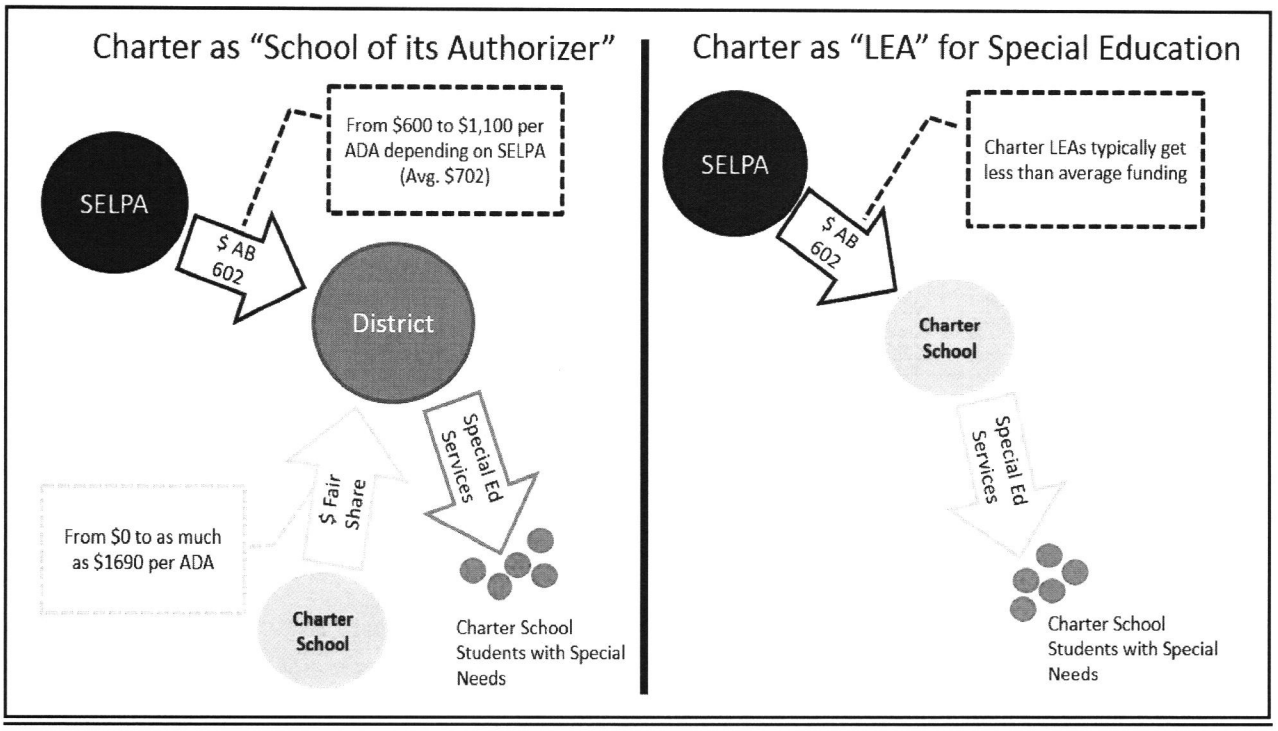
The total funding allocated to education of students with disabilities varies across SELPAs from about $600 per ADA to about $1,100 per ADA, based primarily on what the SELPA received before the AB 602 legislation was adopted.

"Encroachment" and Charter School "Fair Share Contribution"

In nearly every school district across the state, state and federal special education funds are not sufficient to cover all special education expenses. Each LEA must "encroach" upon their general fund to cover these excess costs.

By law, charter schools that operate as schools of their authorizer must contribute an equitable of portion of their block grant funding to support district-wide special education services. (Educ. Code 47646(c)). Because the amount of "encroachment or "fair share contribution" varies from district to district, charter school contributions also differ from district to district. In most districts, this contribution is calculated based on the district's total special education "encroachment" amount, which is translated to the charter school on a per pupil amount or a percentage, such as 25 to 35%. One example is that a charter school's fair share contribution for special education could be 25% of the District's general fund contribution rate per ADA for that fiscal year (this would be paid for from the charter school's general purpose funding). This formula could increase by 5% for each fiscal year until the applicable percentage reaches a set rate, such as 35%. The rate would then remain at 35% for the remainder of the charter school's petition period and be based on the District's general fund contribution rate for the year in question.

The following diagram summarizes the differences in how special education funding is disbursed for charters who are "schools of the district" for purposes of special education versus schools who are their own LEA for purposes of special education.



APPENDIX B: SAMPLE CHARTER PETITION AND MOU LANGUAGE

Important Considerations to Ensure Flexibility for Special Education

Across the state, charter schools have voiced concerns regarding special education. At the center of these concerns is the frustration on the part of many charter schools that operate as a school of their authorizing district to make or influence key decisions about how special education will be funded and delivered at their school.

Although state law offers charter schools the option of operating as an independent Local Educational Agency (LEA) for purposes of special education – an option that provides increased flexibility, autonomy and access to funding – many charter schools face challenges in attempting to exercise this right. Language contained in charter petitions and or MOUs often restricts the ability of charter schools to shift from a school of their authorizer to an LEA for purposes of special education. What's more, authorizers are now requesting increasingly restrictive language in new charters and MOUs.

In order to ensure that charter schools can achieve the flexibility, autonomy, and fiscal capacity necessary to provide high-quality special education services that align with their educational philosophy they must have agreements that allow them to seek LEA status and/or change SELPAs. Special education agreements, particularly charter petitions, should be as broad as possible.

CCSA recommends that charter petition, contract, or MOU language include the following elements:

- Expressly reserve the right for your charter school to become an independent LEA and/or change SELPA membership without requiring a material revision to the charter
- State that your charter school will belong to *a* SELPA, but not require that your school belong to a *specific* SELPA
- State that your charter school will follow policies and procedures as defined in the local plan of the SELPA to which it belongs, but not name a specific SELPA
- Indicate that you will be treated as other district-operated schools, solely for purposes of providing special education and related services under the IDEA, but only so long as your school remains a school of the district for purposes of special education
- Reserve the option for your school to access or contract for alternative special education programs and services, including programs and services outside the authorizing district or SELPA.

Examples of petition language conducive to alternate options:

> "The Charter School shall initially remain, by default, a public school of the District for purposes of Special Education pursuant to Education Code Section 47641(b). However, the Charter School reserves the right to make written verifiable assurances that it shall become an independent local educational agency (LEA) and join a SELPA pursuant to Education Code Section 47641(a) either on its own or with a grouping of charter school LEAs as a consortium. A change in LEA status or SELPA membership shall not require a material revision of this charter."
>
> "So long as the Charter School operates as a public school of the District, solely for purposes of providing special education and related services under the IDEA pursuant to Education Code Section 47641(b), in accordance with Education Code Section 47646 and 20 U.S.C. 1413, the Charter School seeks services from the District for special education students enrolled in the Charter School in the same manner as is provided to students in other District schools. However, the Charter School reserves the right to contract with service providers outside the District when appropriate. The Charter School anticipates that a Memorandum of Understanding (MOU) will be developed between the school and the District, which shall delineate the respective responsibilities of the Charter School and the District with regard to the funding and delivery of special education and related services."

APPENDIX C: SAMPLE NOTIFICATION OF EXIT

If you intend to join a new SELPA, a letter such as the sample below must be sent to your current SELPA, the California Department of Education, and the California Charter Schools Association by June 30 of the year preceding the year in which you intend to join the new SELPA. For example, if you intend to join a new SELPA for the 2017-2018 school year, you must send notification by June 30, 2016.

[CHARTER SCHOOL LETTER HEAD]

[DATE]

[SELPA DIRECTOR NAME]
SELPA Director
[SELPA NAME] SELPA
[SELPA ADDRESS]

Dear [SELPA DIRECTOR]

Please accept this letter as a formal notification that [SCHOOL NAME] intends to exit the [SELPA NAME] SELPA effective school year [20__-20__].

In order to ensure that [SCHOOL NAME] is best equipped to meet the needs of its special needs students, it is considering membership in an alternate SELPA. It also remains open to formulating revised agreements with the [CURRENT SELPA NAME] SELPA and welcomes any related correspondence. If [SCHOOL NAME] finds that it does not make sense to exit at this time, it retains the right to rescind this notification and remain with [SELPA NAME] for the [20__-20__] school year.

Please let me know if you require further information.

Sincerely,

[Name]
[Title]
[Charter School]
[CDE Charter School Number]
[CDE County-District-School Code]
[Phone/Contact Information]

APPENDIX D: SPECIAL EDUCATION SERVICES

If your school were to become an LEA for special education purposes this means that your school would need to ensure that every student has access to the special education services s/he needs. While your school (like any other) cannot *provide* every service that a student could require, it can *ensure access* to these services by establishing relationships with other entities such as other charter schools, non public agencies (NPAs) or other SELPAs.

In order to guide your planning process, you may wish to identify the types of services that you anticipate needing and note those that you are not able to provide on your own. A table like the condensed version below may be a good first step. Note, you may wish to engage a special education expert to determine your specific needs and the best manner to meet those needs.

CASEMIS Code/ SERVICE	Language & Speech / Code #415						Adapted PE (APE) / Code # 425					
PROVIDER	Charter		Local SELPA		NPA		Charter		Local SELPA		NPA	
Full Time Equivalents to provide/ # of students to receive	FTE	#	FTE	#	FTE	#	FTE	#	FTE	#	FTE	#
SCHOOL												
Charter School A	1.0	25									.2	5
Charter School B											.75	20
Subtotals	1.0	.25	0	0	0	0	0	0	0	0	.95	25

How to Use the Table

1. Identify the special education services that you anticipate your students needing in your first year as an LEA in the new SELPA.[10] It might make sense to use your current year services as a baseline. Add additional services as necessary.

2. Place the number of Full-Time Equivalent staff expected to provide the service and the number of students expected to receive the service by the relevant provider. E.g. If your charter expects to employ a .2 FTE (1 full day per week) from a NPA to provide APE to 5 students you would enter as indicated in the table above.

3. Work with other charter schools and your new SELPA to maximize cost efficiency and ensure that all necessary services can be made available. For example—the two schools listed above may wish to share one full time provider of adapted PE rather than contracting with an expensive NPA. A school needing vision services for a few students may be able to work with its new SELPA to access the services of local agencies.

[10] For another list of special education services and descriptions, see: www.cde.ca.gov/sp/se/ds/documents/asp01a.xls

American Indian Model Schools
A School at Work!

AIPCS I & II
Downtown Oakland Campus
171 12th Street
Oakland, CA 94607
Phone: 510.893.8701
Fax: 510.893.0345
Website: aimschools.org

AIPHS
Lakeview Campus
746 Grand Avenue
Oakland, CA 94610
Phone: 510.893.8701
Fax: 510.893.0345
Website: aimschools.org

June 30, 2020

Oakland Unified School District
Special Education/ SELPA
Oakland Charter Office
1000 Broadway, 3rd Floor, Suite 398
Oakland, CA 94607

To whom it may concern:

Please be advised American Indian Public High School, a charter School authorized by Oakland Unified School District, Charter Number 0882, CDS Code 01-61259-0111856, will be leaving Oakland Unified School District's SELPA at the first available opportunity allowed by Education Code. After Consultation with our legal counsel, we understand that to be June 30, 2021 with this notification.

Please advise me if you have any questions or concerns.

Thank you for your assistance.

Maya Woods-Cadiz
Chief Executive Officer/Superintendent
American Indian Public Charter

American Indian Model Schools
A School at Work!

AIPCS I & II
Downtown Oakland Campus
171 12th Street
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Website: aimschools.org

June 30, 2020

Oakland Unified School District
Special Education/ SELPA
Oakland Charter Office
1000 Broadway, 3rd Floor, Suite 398
Oakland, CA 94607

To whom it may concern:

Please be advised American Indian Public Charter II, a charter School authorized by Oakland Unified School District, Charter Number 0765, CDS Code 01-61259-0114363, will be leaving Oakland Unified School District's SELPA at the first available opportunity allowed by Education Code. After Consultation with our legal counsel, we understand that to be June 30, 2021 with this notification.

Please advise me if you have any questions or concerns.

Thank you for your assistance.

Maya Woods-Cadiz
Chief Executive Officer/Superintendent
American Indian Public Charter

American Indian Model Schools
A School at Work!

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Downtown Oakland Campus
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Lakeview Campus
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June 30, 2020

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Special Education/ SELPA
Oakland Charter Office
1000 Broadway, 3rd Floor, Suite 398
Oakland, CA 94607

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Please advise me if you have any questions or concerns.

Thank you for your assistance.

Maya Woods-Cadiz
Chief Executive Officer/Superintendent
American Indian Public Charter

AIMS Board Meeting Item Cover Letter

Item: SELPA Discussion

Presented By: Maya Woods-Cadiz

Staff Recommendation:

AIMS is currently in contract with Oakland Unified School District's SELPA to provide Special Education services to our children. During the 2019-2020 fiscal year the cost significantly increased for those services. This, along with the current fiscal challenges ignites an investigation into other SELPA services. To change SELPA's requires 1 year notification as well as a designation of services. Attached is the process and options.

Committee Approval: Finance Committee

Total Associated Cost: TBD

Included in Budget? Yes

Over or Under Budget?

Amount Over/Under Budget?

Included in LCAP? N/A

Which LCAP?

Coversheet

Review Audit Trail

Section: II. Non-Action Items
Item: D. Review Audit Trail
Purpose: Discuss
Submitted by:
Related Material: Program_Audit_Trail.pdf
Preliminary_ Audit_Expense_Detail.docx

AIMS Board Meeting Item Cover Letter

Item: PPP Program Audit Trail

Presented By: Katema Ballentine

Staff Recommendation:

AIMS fiscal staff has been working diligently with our back office and vendors to preserve a transparent audit trail for the use of the Payment Protection Program (PPP) Funds. Please review the attachment outlining the audit trail and projected expenses.

Committee Approval: Finance Committee

Total Associated Cost: TBD

Included in Budget? Yes

Over or Under Budget? 0

Amount Over/Under Budget?

Included in LCAP? N/A

Which LCAP?

Preliminary Expenses	
Salaries and Benefits March 16 - April 30	1,173,522.61
Mortgage Interest	$ 60,280
Rent	$ 21,783
Utilities	6239
Preliminary Expense Total	1,261,823.76
*Salaries and benefits have not be delineated by Program details	
**Mortgage Interest are based on projected calculation (waiting confirmation on numbers	
***Rent is a projection based on contracted cost	
*****Utility cost are activitly being captured	

Coversheet

Covid-19 Funding Options

Section: III. Action Items
Item: A. Covid-19 Funding Options
Purpose: Vote
Submitted by:
Related Material: Covid-19 Ecomonic Relief Listing.docx
Covid-19 Funding Options.pdf

A. There are four loans available for businesses under 500 employees

1. **Paycheck Protection Program (PPP)**

   The Paycheck Protection Program is a **loan** designed to provide a direct incentive for small businesses to keep their workers on the payroll. SBA will forgive **loans** if all employees are kept on the payroll for eight weeks and the money is used for payroll, rent, mortgage interest, or utilities.

2. **SBA 7(a) Loan**

   An SBA 504 loan is commercial real estate financing for owner-occupied properties. On the other hand, SBA 7a loans can be used to buy a business or obtain working capital. The maximum loan for an SBA 7a loan amount is $5 million. A 504 loan's interest rate is fixed, and no outside collateral is required.

3. **SBA Express Loans**

   SBA Express loans are a simple way to receive expedited, amortized government-guaranteed financing for your small business. Entrepreneurs can be granted up to $350,000 of capital in the form of either a term loan or line of credit. Once received, this capital may be used for various business purposes.

4. **Economic Injury Disaster Loan (EIDL)**

   The Economic Injury Disaster Loan Program (EIDL) can provide up to $2 million of financial assistance (actual loan amounts are based on amount of economic injury) to small businesses or private, non-profit organizations that suffer substantial economic injury as a result of the declared disaster, regardless of whether the applicant sustained physical damage.

   An EIDL can help you meet necessary financial obligations that your business or private, non-profit organization could have met had the disaster not occurred. It provides relief from economic injury caused directly by the disaster and permits you to maintain a reasonable working capital position during the period affected by the disaster. EIDLs do not replace lost sales or revenue.

B. Government Grants

1. EIDL of $10000.00 you pay zero tax on it.
2. PPP eight weeks of payroll.
3.Unemployment plus $600.00 (Individuals)
4. $1200 per taxpayer plus $500 per child. (Individuals)

C. Tax benefits

1. IRA/401(k) Now you can withdraw $100,000 without paying any penalty and pay taxes on it in the next 3 years. You can withdraw $100,000 from your 401k as a hardship loan.

2. Net Operating Loss (NOL) for 2018/2019 and 2020 can be carried back for 5 years.

3. Qualified Improved property (QIP) can be taken as a bonus deduction.

4. Interest deduction has been increased from 30% to 50%

5. Loss Limit for 2018, 2019, and 2020 the excess business **loss** limitation has **been** suspended. It appears that affected taxpayers must amend their 2018 return or 2019 returns to claim the higher **loss**.

AIMS Board Meeting Item Cover Letter

Item: Covid-19 Funding Options

Presented By: Katema Ballentine

Staff Recommendation:

Review and approve the persurance State and Federal funding options for COVID-19 relief

Committee Approval: Finance Committee

Total Associated Cost: 0

Included in Budget? N/A

Over or Under Budget?

Amount Over/Under Budget?

Included in LCAP? N/A

Which LCAP?

Coversheet

Purchase of PPE Equipment

Section: III. Action Items
Item: B. Purchase of PPE Equipment
Purpose: Vote
Submitted by:
Related Material: Covid-19_Purchase_of_PPE_Equiptment.pdf

AIMS Board Meeting Item Cover Letter

Item: Covid-19 Purchase of PPE Equiptment

Presented By: Katema Ballentine

Staff Recommendation:

Staff requests the approval of the purchase for PPE equipment. Projected cost are not to exceed $16,000

Committee Approval: Finance Committee

Total Associated Cost: 16,000

Included in Budget? No

Over or Under Budget? 0

Amount Over/Under Budget?

Included in LCAP? N/A

Which LCAP?

Coversheet

Covid-19 Reimbursement Stipend

Section: III. Action Items
Item: C. Covid-19 Reimbursement Stipend
Purpose: Vote
Submitted by:
Related Material: Covid-19 Home Operations Reimbursement Stipend.pdf

AIMS Board Meeting Item Cover Letter

Item: Covid-19 Home Operations Reimbursement Stipend

Presented By: Katema Ballentine

Staff Recommendation:

As of March 16, 2020 AIMS staff has been obeying the Stay at Home order. On April 6, 2020 school began distant learning sessions. During this time staff has been asked to use their home communication services. AIMS would like to discuss and approve the development and implementation of a COVID-19 Home Operation Reimbursement option

Committee Approval: Finance Committee

Total Associated Cost: TBD

Included in Budget? N/A

Over or Under Budget?

Amount Over/Under Budget?

Included in LCAP? N/A

Which LCAP?

Coversheet

Vent Protection Service

Section: III. Action Items
Item: D. Vent Protection Service
Purpose: Vote
Submitted by:
Related Material: Covid-19 Vent Protection.pdf

AIMS Board Meeting Item Cover Letter

Item: Covid-19 Vent Protection

Presented By: Marisol Magana

Staff Recommendation:

Staff requests the approval of the vent protection $xxxxxx. Cost not to exceed $XX,XXX

Committee Approval: Finance Committee

Total Associated Cost:

Included in Budget?

Over or Under Budget? 0

Amount Over/Under Budget?

Included in LCAP? N/A

Which LCAP?