

Objective and 5 BIG GOALS

CSCE annual objective is reaching 80% proficiency in ELA and Math for all student groups grades 3-8 measured by NWEA MAP.

To achieve this school-wide objective over the next two years, the CSCE has FIVE BIG GOALS

Goal #1: Develop Waldorf-inspired, Common Core-aligned and equity-focused curriculum;

Goal #2: Test and document Waldorf-inspired, Common Core-aligned practices as measured in student and adult learning outcomes;

Goal #3: Maintain a well-operated school environment in Operations, HR and Budget;

Goal #4: Maintain effective community outreach (including parents, community partners, policy and research community); and

Goal #5: Launch long-term fundraising strategy for scale-up with financial stability

BOARD MEMBERS

1. Adrienne Barnes
2. Allegra Alessandri
3. Anastasia Prentiss
4. Grace Pang
5. Kevin Ary
6. Lesbhia Morones
7. Martha Candido

Agenda

	Purpose	Presenter	Time
I. Opening Items			10:00 AM
A. Record Attendance		Adrienne Barnes	3 m
B. Call the Meeting to Order		Anastasia Prentiss	3 m
C. Agenda Approval	Vote	Anastasia Prentiss	3 m
D. Public Comment	Discuss	Anastasia Prentiss	5 m

	Purpose	Presenter	Time
II. Consent Agenda			10:14 AM
A. Approve Minutes - Monday, November 7th, 2022	Approve Minutes	Anastasia Prentiss	2 m
B. Approve Minutes - Monday, January 9th, 2023 - Special Board Meeting	Approve Minutes	Anastasia Prentiss	2 m
C. Approve Minutes - Wednesday, January 18th, 2023	Approve Minutes	Anastasia Prentiss	2 m
D. January Check Register	Vote	Kimberly Palmore	2 m
III. Committee Updates			10:22 AM
A. Academic Excellence Committee	Discuss	Anastasia Prentiss	5 m
B. Development Committee	Discuss	Kimberly Palmore	5 m
C. Finance Committee	Discuss	Adrienne Barnes	5 m
D. Governance Committee	Discuss	Anastasia Prentiss	5 m
E. Facilities Committee	Discuss	Phillip Gedeon	5 m
IV. Academic Excellence			10:47 AM
A. PowerSchool Data Dashboard and Attendance Communication Contract	Vote	Phillip Gedeon	5 m
V. Development			
VI. Finance			
VII. Governance			10:52 AM
A. Approval of SARC	Vote	Phillip Gedeon	10 m
VIII. Board Retreat			11:02 AM
A. Welcome & Introductions	FYI	Anastasia Prentiss	10 m

	Purpose	Presenter	Time
B. Verse & Movement	FYI	Phillip Gedeon	5 m
C. Retreat Objectives	Discuss	Anastasia Prentiss	20 m
D. Team Building Exercise	FYI	Anastasia Prentiss	15 m
E. Role of the Governance Board	Discuss	Anastasia Prentiss	30 m
F. Break	FYI	Anastasia Prentiss	10 m
G. Head of School Evaluation Process	Discuss	Anastasia Prentiss	30 m
H. Lunch	FYI	Anastasia Prentiss	30 m
I. Form 700 Presentation	FYI	Kimberly Palmore	10 m
J. Facilities Update	Vote	Anastasia Prentiss	20 m
K. Board Committee Updates & Assignments	Discuss	Anastasia Prentiss	20 m
L. Committee Breakout Session	Discuss	Anastasia Prentiss	30 m
IX. Other Items			2:52 PM
A. Upcoming Board Meetings:	FYI	Anastasia Prentiss	3 m
Tuesday, February 21st			
Tuesday, March 14th			
Tuesday, April 11th			
Tuesday, May 9th			
Saturday, June 10th - End of the Year Retreat			
X. Closing Items			2:55 PM
A. Adjourn Meeting	Vote	Anastasia Prentiss	1 m

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Coversheet

Approve Minutes - Monday, November 7th, 2022

Section: II. Consent Agenda
Item: A. Approve Minutes - Monday, November 7th, 2022
Purpose: Approve Minutes
Submitted by:
Related Material: 2022_11_07_board_meeting_minutes.pdf

*To achieve this school-wide objective over the next two years,
the CSCE has FIVE BIG GOALS*

Goal #1: Develop Waldorf-inspired, Common Core-aligned and equity-focused curriculum;

Goal #2: Test and document Waldorf-inspired, Common Core-aligned practices as measured in student and adult learning outcomes;

Goal #3: Maintain a well-operated school environment in Operations, HR and Budget;

Goal #4: Maintain effective community outreach (including parents, community partners, policy and research community); and

Goal #5: Launch long-term fundraising strategy for scale-up with financial stability

Directors Present

A. Alessandri (remote), A. Barnes (remote), A. Prentiss (remote), G. Pang (remote), L. Morones (remote)

Directors Absent

K. Ary, M. Candido, S. Richardson Baker

Guests Present

A. Barraza (remote), I. Oberman (remote), K. Palmore (remote), L. Garrison (remote), P. Gedeon (remote), R. Alcantar (remote)

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

A. Prentiss called a meeting of the board of directors of Community School for Creative Education to order on Monday Nov 7, 2022 at 6:22 PM.

C. Agenda Approval

L. Morones made a motion to Approve Agenda as is except October Registra (was not uploaded to the packet).

A. Alessandri seconded the motion.

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

Roll Call

S. Richardson Baker Absent

K. Ary Absent

L. Morones Aye

A. Barnes Aye

A. Prentiss Aye

G. Pang Aye

A. Alessandri Aye

M. Candido Absent

D. Public Comment

II. Consent Agenda

A. Resolution of Findings under AB 361

L. Morones made a motion to Approve Resolution of Findings under AB 361.

A. Alessandri seconded the motion.

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

Roll Call

L. Morones	Aye
G. Pang	Aye
M. Candido	Absent
S. Richardson Baker	Absent
A. Barnes	Aye
A. Prentiss	Aye
A. Alessandri	Aye
K. Ary	Absent

B. Approve Minutes - Monday, October 3, 2022

L. Morones made a motion to approve the minutes from 22-23 CSCE Monthly Board Meeting - Monday, October 3, 2022 on 10-03-22.

A. Alessandri seconded the motion.

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

Roll Call

A. Barnes	Aye
M. Candido	Absent
L. Morones	Aye
G. Pang	Aye
A. Prentiss	Aye
K. Ary	Absent
S. Richardson Baker	Absent
A. Alessandri	Aye

C. Approve Minutes - Special Board Meeting October, 13, 2022

L. Morones made a motion to approve the minutes from CSCE Special Board Meeting on 10-13-22.

A. Alessandri seconded the motion.

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

Roll Call

A. Alessandri	Aye
G. Pang	Aye
A. Barnes	Aye
S. Richardson Baker	Absent
M. Candido	Absent
K. Ary	Absent
A. Prentiss	Aye
L. Morones	Aye

D. October Check Register

III. Governance

A.

Head of School Report

B. Arts Block Grant Plan Template

A. Alessandri made a motion to Approve Arts Block Grant Plan Template.

A. Barnes seconded the motion.

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

Roll Call

S. Richardson Baker	Absent
G. Pang	Aye
A. Alessandri	Aye
A. Prentiss	Aye
A. Barnes	Aye
K. Ary	Absent
L. Morones	Aye
M. Candido	Absent

C. Title IX Policy

A. Barnes made a motion to Approve Title IX Policy pending change of titles.

G. Pang seconded the motion.

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

Roll Call

A. Barnes	Aye
S. Richardson Baker	Absent
G. Pang	Aye
A. Alessandri	Aye
K. Ary	Absent
L. Morones	Aye
A. Prentiss	Aye
M. Candido	Absent

D. Life AD&D, LTD, & Voluntary Life Insurance

A. Alessandri made a motion to Approve Life AD&D, LTD, & Voluntary Life Insurance.

A. Barnes seconded the motion.

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

Roll Call

A. Barnes	Aye
S. Richardson Baker	Absent
A. Alessandri	Aye
A. Prentiss	Aye
L. Morones	Aye
G. Pang	Aye
K. Ary	Absent
M. Candido	Absent

E. AB 361 Update/AB 2449 New Teleconference Option

F. Board Livescan Reminder

IV. Closing Items

A.

Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:03 PM.

Respectfully Submitted,
L. Morones

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Coversheet

Approve Minutes - Monday, January 9th, 2023 - Special Board Meeting

Section: II. Consent Agenda
Item: B. Approve Minutes - Monday, January 9th, 2023 - Special Board Meeting
Purpose: Approve Minutes
Submitted by:
Related Material: 2023_01_09_board_meeting_minutes.pdf

the CSCE has FIVE BIG GOALS

Goal #1: Develop Waldorf-inspired, Common Core-aligned and equity-focused curriculum;

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Goal #4: Maintain effective community outreach (including parents, community partners, policy and research community); and

Goal #5: Launch long-term fundraising strategy for scale-up with financial stability

BOARD MEMBERS

1. Adrienne Barnes
2. Allegra Alessandri
3. Anastasia Prentiss
4. Grace Pang
5. Kevin Ary
6. Lesbhia Morones
7. Martha Candido

Directors Present

A. Alessandri (remote), A. Barnes (remote), A. Prentiss (remote), G. Pang (remote), M. Candido (remote)

Directors Absent

K. Ary, L. Morones

Guests Present

A. Barraza (remote), K. Palmore (remote), L. Garrison (remote), P. Gedeon (remote), R. Alcantar (remote)

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

A. Prentiss called a meeting of the board of directors of Community School for Creative Education to order on Monday Jan 9, 2023 at 6:07 PM.

C. Agenda Approval

A. Alessandri made a motion to Approve Agenda.

M. Candido seconded the motion.

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

Roll Call

G. Pang	Aye
A. Prentiss	Aye
A. Barnes	Aye

Roll Call

L. Morones Absent
K. Ary Absent
M. Candido Aye
A. Alessandri Aye

D. Public Comment

II. Consent Agenda

A. Resolution of Findings under AB 361

A. Alessandri made a motion to Approve Consent Agenda.
G. Pang seconded the motion.
The board **VOTED** unanimously to approve the motion.

Roll Call

K. Ary Absent
A. Alessandri Aye
L. Morones Absent
G. Pang Aye
A. Prentiss Aye
M. Candido Aye
A. Barnes Aye

III. Governance

A. Revised CSCE Board Meeting for 22-23 School Year

A. Barnes made a motion to Approve revised CSCE Board Meeting for 22-23 School Year.
A. Alessandri seconded the motion.
The board **VOTED** unanimously to approve the motion.

Roll Call

A. Alessandri Aye
A. Prentiss Aye
A. Barnes Aye
K. Ary Absent
L. Morones Absent
M. Candido Aye
G. Pang Aye

IV. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:53 PM.

Respectfully Submitted,

A. Alessandri

A. Alessandri made a motion to Adjourn Meeting.

M. Candido seconded the motion.

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

Roll Call

A. Barnes Aye

Roll Call

A. Prentiss Aye
M. Candido Aye
G. Pang Aye
K. Ary Absent
L. Morones Absent
A. Alessandri Aye

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Coversheet

Approve Minutes - Wednesday, January 18th, 2023

Section: II. Consent Agenda
Item: C. Approve Minutes - Wednesday, January 18th, 2023
Purpose: Approve Minutes
Submitted by:
Related Material: 2023_01_18_board_meeting_minutes.pdf

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Goal #3: Maintain a well-operated school environment in Operations, HR and Budget;

Goal #4: Maintain effective community outreach (including parents, community partners, policy and research community); and

Goal #5: Launch long-term fundraising strategy for scale-up with financial stability

BOARD MEMBERS

1. Adrienne Barnes
2. Allegra Alessandri
3. Anastasia Prentiss
4. Grace Pang
5. Kevin Ary
6. Lesbhia Morones
7. Martha Candido

Directors Present

A. Alessandri (remote), A. Barnes (remote), A. Prentiss (remote), G. Pang (remote), L. Morones (remote)

Directors Absent

K. Ary, M. Candido

Directors who arrived after the meeting opened

L. Morones

Guests Present

A. Barraza (remote), K. Palmore (remote), L. Garrison (remote), P. Gedeon (remote), R. Alcantar (remote)

I. Opening Items

A. Record Attendance

B. Call the Meeting to Order

A. Prentiss called a meeting of the board of directors of Community School for Creative Education to order on Wednesday Jan 18, 2023 at 6:12 PM.

C. Agenda Approval

A. Alessandri made a motion to Approve Agenda.

A. Barnes seconded the motion.

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

Roll Call

- A. Prentiss Aye
- A. Alessandri Aye
- L. Morones Absent
- M. Candido Absent
- G. Pang Aye
- K. Ary Absent
- A. Barnes Aye

D. Public Comment

II. Consent Agenda

A. Approve Minutes - Monday, December 5th, 2022

A. Alessandri made a motion to approve the minutes from CSCE Board Meeting - Monday, December 5th, 2022 on 12-05-22.
A. Barnes seconded the motion.
with amendment to approve December Minutes including Resolution Findings
The board **VOTED** unanimously to approve the motion.

Roll Call

- A. Alessandri Aye
- K. Ary Absent
- G. Pang Aye
- A. Prentiss Aye
- L. Morones Absent
- A. Barnes Aye
- M. Candido Absent

B. December Check Register

A. Alessandri made a motion to Approve Consent Agenda with amendment to approve December Minutes including Resolution Findings.
A. Barnes seconded the motion.
The board **VOTED** unanimously to approve the motion.

Roll Call

- A. Barnes Aye
- A. Alessandri Aye
- L. Morones Absent
- G. Pang Aye
- K. Ary Absent
- A. Prentiss Aye
- M. Candido Absent

III. Academic Excellence

A. Review of Assembly Bill 1505 - Criteria for Charter Renewal

B. CSCE CA Achievement Data Comparison

C. PowerSchool Data Dashboard and Attendance Communication Contract

L. Morones arrived.

D.

Approval of local indicators for CA Dashboard

A. Alessandri made a motion to Approve Local Indicators for CA Dashboard.

G. Pang seconded the motion.

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

Roll Call

K. Ary	Absent
A. Prentiss	Aye
M. Candido	Absent
G. Pang	Aye
A. Barnes	Aye
L. Morones	Aye
A. Alessandri	Aye

IV. Development

A. Facilities Update and Next Steps

A. Barnes made a motion to Approve Facilities Agreement with amendment to remove 2111 property from the agreement.

L. Morones seconded the motion.

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

Roll Call

G. Pang	Aye
L. Morones	Aye
A. Barnes	Aye
M. Candido	Absent
A. Alessandri	Aye
A. Prentiss	Aye
K. Ary	Absent

V. Governance

A. ASES Authorized Agent Resolution

A. Barnes made a motion to Approve ASES Authorized Agent Resolution.

A. Alessandri seconded the motion.

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

Roll Call

L. Morones	Aye
K. Ary	Absent
G. Pang	Aye
A. Prentiss	Aye
M. Candido	Absent
A. Alessandri	Aye
A. Barnes	Aye

B. COVID Policy Update

A. Alessandri made a motion to COVID Policy Update.

L. Morones seconded the motion.

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

Roll Call

A. Prentiss	Aye
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Roll Call

M. Candido Absent
G. Pang Aye
A. Alessandri Aye
K. Ary Absent
L. Morones Aye
A. Barnes Aye

C. CSCE BOT Board Goals Tracking Dashboard

D. CSCE BOT Board Composition Profile

E. Revised CSCE Board Meeting for 22-23 School Year

L. Morones made a motion to Approve Revised CSCE Board Meeting for 22-23 School Year.

A. Alessandri seconded the motion.

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

Roll Call

A. Barnes Aye
M. Candido Absent
L. Morones Aye
K. Ary Absent
A. Prentiss Aye
G. Pang Aye
A. Alessandri Aye

F. February Board Retreat Agenda Items Discussion

G. CCSA Board Meeting Conference Dates

VI. 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 9:08 PM.

Respectfully Submitted,

A. Prentiss

L. Morones made a motion to Approve to Adjourn Meeting.

A. Alessandri seconded the motion.

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

Roll Call

G. Pang Aye
A. Prentiss Aye
A. Barnes Aye
L. Morones Aye
A. Alessandri Aye
K. Ary Absent
M. Candido Absent

Documents used during the meeting

- CSCE Check Register December 2022.pdf
- PowerSchool Unified Insights MTSS Flyer.pdf
- PowerSchool Unified Operations Attendance Intervention Suite Flyer.pdf
- SA Fruitvale Sales Comp Rpt 122822.pdf
- CSCE Representation Agreement Jan 2023.pdf
- ASES Authorized Agent Resolution.pdf
- CSCE Safe Return to Reopen Plan and COVID Prevention Plan Updated 1.9.23.pdf

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Coversheet

January Check Register

Section: II. Consent Agenda
Item: D. January Check Register
Purpose: Vote
Submitted by:
Related Material: CSCE Check Register January 2023.pdf

Community School for Creative Education

Check Register 1/1/2023 through 1/31/2023

Payment Number	Payment Date	Payee Name	Rec Status	Check Amount	Account	Account Description	Transaction Description	Invoiced GL Amount
40000518	1/5/2023	Sonitrol	Cleared	\$237.50	62-0000-0000-8100-5500-020-000-000	Operation & Housekeeping Services	Intrusion Services	\$237.50
40000521	1/5/2023	Xobee Networks Inc	Cleared	\$108.00	62-0000-1110-2700-5900-020-000-000	Communications	Monthly Communications Service Charges	\$108.00
40000517	1/5/2023	Maxim Healthcare Staffing Services, Inc.	Cleared	\$1,192.50	62-6500-5760-1190-5810-020-000-000	Educational Consultants	ES Behavior Tech Services - 12/12/22 - 12/15/22	\$1,192.50
40000513	1/5/2023	Alma Partners	Cleared	\$4,625.00	62-0000-1110-1000-5210-020-000-000	Training & Development Expense	DEIJ Consulting - December 2022	\$4,625.00
40000512	1/5/2023	Raul J. Alcantar	Cleared	\$300.00	62-0000-0000-2700-5800-020-000-000	Professional/Consulting Services & Operating Expenditures	Board Secretary Meeting - 12/5/22	\$300.00
40000515	1/5/2023	Colorprint	Cleared	\$4,628.75	62-0000-0000-2700-5815-020-000-000	Advertising / Recruiting	Enrollment Mailer	\$4,628.75
40000519	1/5/2023	Townsend Maintenance Co., LLC	Cleared	\$8,270.00	62-3213-0000-8100-5500-020-000-000	Operation & Housekeeping Services	Janitorial Maintenance Service - November 2022	\$8,270.00
40000520	1/5/2023	Vision Service Plan - (CA)	Cleared	\$158.66	62-0000-1110-1000-3401-020-000-000	Health & Welfare Benefits Certificated	January 2023 Premium	\$158.66
40000516	1/5/2023	ChildCare Careers, LLC	Cleared	\$3,312.75	62-0000-1110-1000-5810-020-000-000	Educational Consultants	Substitute Services - 12/5/22 - 12/16/22	\$3,312.75
40000514	1/5/2023	Gabriel Ben-Shalom	Cleared	\$33.19	62-4127-1110-1000-4315-020-000-000	Classroom Materials & Supplies	REIMB: Art Supplies - 12/20/22	\$33.19
40000522	1/10/2023	MetLife 804466	Cleared	\$1,218.44	62-0000-1110-1000-3401-020-000-000	Health & Welfare Benefits Certificated	Dec 2022 AD&D, LTD, Life	\$609.22
					62-0000-1110-1000-3401-020-000-000	Health & Welfare Benefits Certificated	Jan 2023 AD&D, LTD, Life	\$609.22
40000527	1/17/2023	Katherine Au, LMFT	Cleared	\$240.00	62-4201-0000-2700-5800-020-000-000	Professional/Consulting Services & Operating Expenditures	December 2022 - Individual Supervision	\$240.00
40000528	1/17/2023	Gabriel Ben-Shalom	Cleared	\$125.54	62-4127-1110-1000-4315-020-000-000	Classroom Materials & Supplies	REIMB: Art Supplies - 01/03/23	\$125.54
40000531	1/17/2023	Ed Sped Solutions, Inc.	Cleared	\$8,101.80	62-6500-5760-1190-5810-020-000-000	Educational Consultants	Behavior Services December 1-31, 2022	\$8,101.80

Community School for Creative Education

Check Register 1/1/2023 through 1/31/2023

40000524	1/17/2023	Ascend Rehab Services, Inc.	Outstanding	\$2,148.50	62-6500-5760 -1190-5810- 020-000-000	Educational Consultants	Therapist Services 11/26/22 - 11/30/22	\$2,148.50
40000523	1/17/2023	Alameda County Office of Education	Cleared	\$354.00	62-0000-0000 -7300-5803- 020-000-000	Banking & Payroll Service Fees	2nd Quarter STRS Processing Fee FY22-23	\$354.00
40000526	1/17/2023	Amazon Capital Services	Cleared	\$1,815.81	62-0000-0000 -8100-4381- 020-000-000	Materials For Plant Maintenance	File cabinet replacement keys	\$29.50
					62-0000-0000 -8100-4381- 020-000-000	Materials For Plant Maintenance	Paper towel, bleach, trash liners	\$1,575.35
					62-6300-1110 -1000-4200- 020-000-000	Books & Other Reference Materials	Hidden Figures Young Readers Edition	\$210.96
40000530	1/17/2023	CDW Government	Cleared	\$532.50	62-3218-0000 -2700-4400- 020-000-000	Noncapitalized Equipment	HP 11 Laptops - QTY 20	\$189.41
					62-3218-0000 -2700-4400- 020-000-000	Noncapitalized Equipment	HP 14 Laptops - QTY 10	\$343.09
40000529	1/17/2023	Charter Safe	Cleared	\$5,515.00	62-0000-1110 -1000-3603- 020-000-000	Worker Compensation Insurance	February 2022-2023 - Workers Comp	\$1,910.00
					62-0000-0000 -2700-5400- 020-000-000	Insurance	February 2022-2023 - Package Premium	\$3,605.00
40000525	1/17/2023	Attitudinal Healing Connection, Inc.	Cleared	\$14,931.48	62-6010-1110 -1000-5810- 020-000-000	Educational Consultants	CSCE2223-05	\$14,931.48
40000541	1/17/2023	Townsend Maintenance Co., LLC	Cleared	\$8,270.00	62-3213-0000 -8100-5500- 020-000-000	Operation & Housekeeping Services	Janitorial Maintenance Services - January 2023	\$8,270.00
40000542	1/17/2023	T-Mobile	Cleared	\$1,988.86	62-3213-1110 -2700-5900- 020-000-000	Communications	January 2022 Cell Phone Services	\$1,010.53
					62-3213-1110 -2700-5900- 020-000-000	Communications	December 2022 Cell Phone Services	\$978.33
40000543	1/17/2023	Law Offices of Young, Minney, & Corr, LLP	Cleared	\$2,554.00	62-0000-0000 -7100-5805- 020-000-000	Legal Services	Legal Services Through 12/31/22	\$2,554.00
40000536	1/17/2023	Maxim Healthcare Staffing Services, Inc.	Cleared	\$948.00	62-6500-5760 -1190-5810- 020-000-000	Educational Consultants	ES Behavior Tech Services 12/12 - 12/14/22	\$948.00

Community School for Creative Education

Check Register 1/1/2023 through 1/31/2023

40000534	1/17/2023	Donald Landers	Cleared	\$180.00	62-0000-0000-2700-5815-020-000-000	Advertising / Recruiting	Layout and Design Svcs for CSCE Direct Mailer December 2022	\$180.00
40000532	1/17/2023	Silvia Guzman	Cleared	\$292.50	62-4203-1110-2100-5800-020-000-000	Professional/Consulting Services & Operating Expenditures	Interpretation Services 11/02 - 11/16/22 & 12/05/22	\$292.50
40000539	1/17/2023	Sonitrol	Cleared	\$1,362.69	62-0000-0000-8100-5500-020-000-000	Operation & Housekeeping Services	Intrusion Monitoring 2/1/ - 4/30/2023	\$1,362.69
40000540	1/17/2023	Seneca Family of Agencies	Cleared	\$21,875.18	62-3210-1110-1000-5810-020-000-000	Educational Consultants	1.0 FTE Unconditional Education Coach - Oct 2022	\$14,583.33
					62-3210-1110-1000-5810-020-000-000	Educational Consultants	83CSCE-NOV22	\$7,291.85
40000537	1/17/2023	R & S Overhead Garage Door, Inc	Cleared	\$511.90	62-0000-0000-8100-5601-020-000-000	Building Maintenance	Repair Work - Late Fee	\$17.32
					62-0000-0000-8100-5601-020-000-000	Building Maintenance	Repair Work - Rekey 1 Key Switch	\$494.58
40000538	1/17/2023	Sonitrol	Cleared	\$56.90	62-0000-0000-2700-5800-020-000-000	Professional/Consulting Services & Operating Expenditures	Key / Keycards	\$56.90
40000535	1/17/2023	Lionbridge Technologies Inc	Cleared	\$5.52	62-4203-1110-2100-5800-020-000-000	Professional/Consulting Services & Operating Expenditures	Telephonic Charges December 2022	\$5.52
40000533	1/17/2023	Walter Berry Harris Jr.	Cleared	\$780.00	62-3216-0000-2700-5800-020-000-000	Professional/Consulting Services & Operating Expenditures	Facilities Repairs and Maintenance	\$780.00
40000544	1/20/2023	Alameda County Office of Education	Cleared	\$33,407.03	62-0000-0000-0000-9503-020-000-000	Accrued STRS	December 2022 STRS	\$33,407.03
40000546	1/24/2023	Ascend Rehab Services, Inc.	Outstanding	\$3,692.00	62-6500-5760-1190-5810-020-000-000	Educational Consultants	Therapist Services 12/01/22 - 12/15/22	\$3,692.00
40000545	1/24/2023	Alameda County Office of Education	Outstanding	\$4,152.60	62-0000-1110-2700-5875-020-000-000	District Oversight Fees	2nd QTR Oversight/Monitoring Charges Oct-Dec 2022 - FY 22/23	\$4,152.60
40000550	1/24/2023	Maxim Healthcare Staffing Services, Inc.	Cleared	\$990.00	62-6500-5760-1190-5810-020-000-000	Educational Consultants	ES Behavior Tech Services 01/05 - 01/05/23	\$990.00
40000547	1/24/2023	Amazon Capital Services	Cleared	\$2,069.09	62-6300-1110-1000-4315-020-000-000	Classroom Materials & Supplies	Pencils, Notebook Paper, Dry Erase Markers, Craft Sticks	\$211.74

Community School for Creative Education

Check Register 1/1/2023 through 1/31/2023

					62-0000-0000-2700-5815-020-000-000	Advertising / Recruiting	Paracord Tactical Rope	\$23.04
					62-0000-0000-2700-4300-020-000-000	Materials & Supplies	USB Chargers/Cable , Cable Ties, and Ext Cords	\$291.55
					62-3213-0000-2700-4300-020-000-000	Materials & Supplies	Adult Face Masks	\$109.95
					62-6300-1110-1000-4100-020-000-000	Approved Textbooks & Core Curricula Materials	Peter Pan -the Original 1911 Classis	\$193.82
					62-3213-0000-2700-4300-020-000-000	Materials & Supplies	Children's Face Masks	\$192.61
					62-0000-0000-8100-4381-020-000-000	Materials For Plant Maintenance	Cleaning Supplies	\$368.74
					62-0000-0000-2700-4300-020-000-000	Materials & Supplies	Paper Clips, Dry Erase Markers, Raffle Tickets, Tape etc	\$677.64
40000549	1/24/2023	Dr. Lindsay Dell	Outstanding	\$1,250.00	62-6500-5760-1190-5800-020-000-000	Professional/Consulting Services & Operating Expenditures	Counseling Services	\$1,250.00
40000548	1/24/2023	Charter School Management Corporation	Cleared	\$6,667.00	62-0000-1110-2700-5873-020-000-000	Financial Services	February 2023 - Business Back Office Monthly Support	\$4,666.90
					62-0000-0000-7300-5873-020-000-000	Financial Services	February 2023 - Business Back Office Monthly Support	\$2,000.10
40000551	1/24/2023	Seneca Family of Agencies	Cleared	\$13,111.85	62-3210-1110-1000-5810-020-000-000	Educational Consultants	1.0 FTE Unconditional Education Coach - December 2022	\$7,291.85
					62-6546-5760-1190-5810-020-000-000	Educational Consultants	TUITION-CATALYST	\$2,400.00
					62-6546-5760-1190-5810-020-000-000	Educational Consultants	CATALYST DISTRICT MH-CM	\$3,420.00
40000554	1/27/2023	ChildCare Careers, LLC	Outstanding	\$1,375.92	62-2600-1110-1000-5810-020-000-000	Educational Consultants	Long Term Teacher Services	\$973.89
					62-0000-1110-1000-5810-020-000-000	Educational Consultants	Substitute Teacher Services - 1/4/23 - 1/6/23	\$402.03

Community School for Creative Education

Check Register 1/1/2023 through 1/31/2023

40000552	1/27/2023	Adriana San Millan School Psychology and Special Ed Svs LLC	Outstanding	\$2,595.00	62-6500-5760 -1190-5810- 020-000-000	Educational Consultants	Triennial Psycho-Educational Eval, IEP Attendance(Virtual)	\$2,595.00
40000553	1/27/2023	Amazon Capital Services	Cleared	\$1,228.71	62-0000-1110 -2100-4300- 020-000-000	Materials & Supplies	2023 CA State & Federal Labor Law Psoter	\$32.85
					62-6010-1110 -2100-4300- 020-000-000	Materials & Supplies	Backpacks,Fist Aid Kits	\$89.73
					62-0000-1110 -2100-4400- 020-000-000	Noncapitalized Equipment	Moukey Portable Wspeaker/PA System	\$198.44
					62-0000-1110 -2100-4300- 020-000-000	Materials & Supplies	Hanging File Folder Labels/Tabs, 2 Pocket Folders	\$68.70
					62-0000-1110 -2100-4300- 020-000-000	Materials & Supplies	Backpacks	\$144.41
					62-0000-1110 -1000-4430- 020-000-000	Noncapitalized Student Equipment	Projector	\$694.58
40000558	1/27/2023	Esther Pyon	Outstanding	\$12.48	62-0000-1110 -2100-4300- 020-000-000	Materials & Supplies	REIMB: Snacks for Lunch Bunch - 1/16/23	\$12.48
40000559	1/27/2023	Revolution Foods, PBC	Outstanding	\$10,427.90	62-5320-1110 -3700-4700- 020-000-000	Food & Food Supplies	December 2022 Food Service Program	\$3,537.00
					62-5310-1110 -3700-4700- 020-000-000	Food & Food Supplies	December 2022 Food Service Program	\$6,890.90
40000560	1/27/2023	Vision Service Plan - (CA)	Cleared	\$185.74	62-0000-1110 -1000-3401- 020-000-000	Health & Welfare Benefits Certificated	February 2023 Premium	\$185.74
40000557	1/27/2023	MetLife 804466	Outstanding	\$609.22	62-0000-0000 -2700-5400- 020-000-000	Insurance	Feb 2023 AD&D, LTD Life Insurance	\$609.22
40000556	1/27/2023	Moss Farms	Outstanding	\$6,250.00	62-3213-1110 -2100-4300- 020-000-000	Materials & Supplies	Art of Nature-Mod 3 - Festival of Peace & Hope Feb 1-3,2023	\$6,250.00
40000555	1/27/2023	First-Citizens Bank & Trust Co	Cleared	\$2,427.33	62-0000-0000 -8700-5605- 020-000-000	Equipment Rental/Lease Expense	Canon Copier Lease	\$2,427.33
Total Check Amount				\$187,126.84	Total GL Amount			\$187,126.84

Coversheet

PowerSchool Data Dashboard and Attendance Communication Contract

Section: IV. Academic Excellence
Item: A. PowerSchool Data Dashboard and Attendance Communication
Contract
Purpose: Vote
Submitted by:
Related Material: Community School for Creative Education PowerSchool Suite Quote.pdf



PowerSchool Group LLC
 150 Parkshore Dr., Folsom, CA 95630
 Quote #: Q-737398 - 1
 Quote Expiration Date: 24-FEB-2023

Sales Quote - This Is Not An Invoice

Prepared By:	Lauren Pierson	Customer Contact:	Phillip Gedeon
Customer Name:	Community School for Creative Education	Title:	Head of School
Enrollment:	193	Address:	2111 International blvd.
Contract Term:	36 Months	City:	Oakland
Start Date:	1-FEB-2023	State/Province:	California
End Date:	31-JAN-2026	Zip Code:	94606
		Country:	United States
		Phone #:	(510) 686-4131

Product Description	Quantity	Unit	Extended Price
Initial Term 1-FEB-2023 - 31-JAN-2024			
License and Subscription Fees			
Unified Insights Platform Hosted	193.00	Students	USD 2,000.00
Unified Insights Student Essentials Hosted	193.00	Students	USD 5,000.00
Unified Insights One Time Discount	1.00	Each	USD -1,496.50
Unified Insights MTSS	193.00	Students	USD 482.50
Unified Home Attendance Intervention Suite Subscription	193.00	Students	USD 5,250.00
Unified Home One Time Discount	1.00	Each	USD -2,625.00
		License and Subscription Totals:	USD 8,611.00
Professional Services and Setup Fees			
Unified Insights Essentials PS SIS Hosted Deployment	1.00	Each	USD 4,368.00
Unified Insights Keys to Ownership	10.00	Hours	USD 1,800.00
Unified Insights Keys to Ownership	10.00	Hours	USD 1,800.00
Unified Home Attendance Intervention Suite Deployment	1.00	Each	USD 5,040.00
		Professional Services and Setup Fee Totals:	USD 13,008.00
Training Services			
Unified Insights Training Remote	3.00	Hours	USD 720.00
Unified Home Training Remote	6.00	Hours	USD 1,440.00
		Training Services Total:	USD 2,160.00
Subscription Period Total			

PowerSchool hereby agrees to allow the Customer to make the following non-standard payments for the current annual term:

Total Discount	USD 7,913.50
Initial Term	1-FEB-2023 - 31-JAN-2024
Amount To Be Invoiced	USD 23,779.00

Due Date	Payment Amount
1-FEB-2023	USD 0.00
1-JUL-2023	USD 23,779.00

Annual Ongoing Fees as of 1-FEB-2024 - Fees subject to an annual uplift, which will be reflected on renewal quote

Unified Insights Platform Hosted	193.00	Students	USD 2,000.00
Unified Insights Student Essentials Hosted	193.00	Students	USD 5,000.00
Unified Insights MTSS	193.00	Students	USD 482.50
Unified Home Attendance Intervention Suite Subscription	193.00	Students	USD 5,250.00

Annual Ongoing Fees Total: **USD 12,732.50**

Fees charged in subsequent periods after the duration of this quote will be subject to an annual uplift. Customer understands the above Annual Ongoing Fees for the next subscription period do not include the annual uplift, which will be applied at the time of renewal. On-Going PowerSchool Subscription/Maintenance and Support fees are invoiced at the then current rates and enrollment per terms of the main agreement executed between PowerSchool and Customer ("Main Services Agreement"). Any applicable state sales tax has not been added to this quote. Subscription Start and End Dates shall be as set forth above, which may be delayed based upon the date that PowerSchool receives your purchase order. If this quote includes promotional pricing, such promotional pricing may not be valid for the entire duration of this quote. All invoices shall be sent to Customer upon or promptly after execution of this quote, unless otherwise set forth in the applicable statement of work or Main Services Agreement (e.g., services billed on time and material basis will be invoiced when such services are incurred). Payment shall be due to PowerSchool before or on the due date set forth on the applicable invoice. All purchase orders must contain the exact quote number stated within. Customer agrees that purchase orders are for confirming this order and its own internal purposes, and no other. Any credit provided by PowerSchool is nonrefundable and must be used within 12 months of issuance. Unused credits will be expired after 12 months. Treatment of purchase orders are governed as provided in the Main Services Agreement. By execution of this quote, or its incorporation, this and future purchases of subscriptions or services from PowerSchool are subject to and incorporate the terms and conditions found at: https://www.powerschool.com/MSA_Feb2022/

THE PARTIES BELOW ACKNOWLEDGE THAT THEY HAVE READ THE AGREEMENT, UNDERSTAND IT AND AGREE TO BE BOUND BY ITS TERMS.

POWERSCHOOL GROUP LLC
Signature:

Community School for Creative Education
Signature:



Printed Name: Eric Shander

Printed Name:

Title: Chief Financial Officer

Title:

Date: 31-JAN-2023

Date:

*****Sales Quote - This Is Not an Invoice*****

Statement of Work

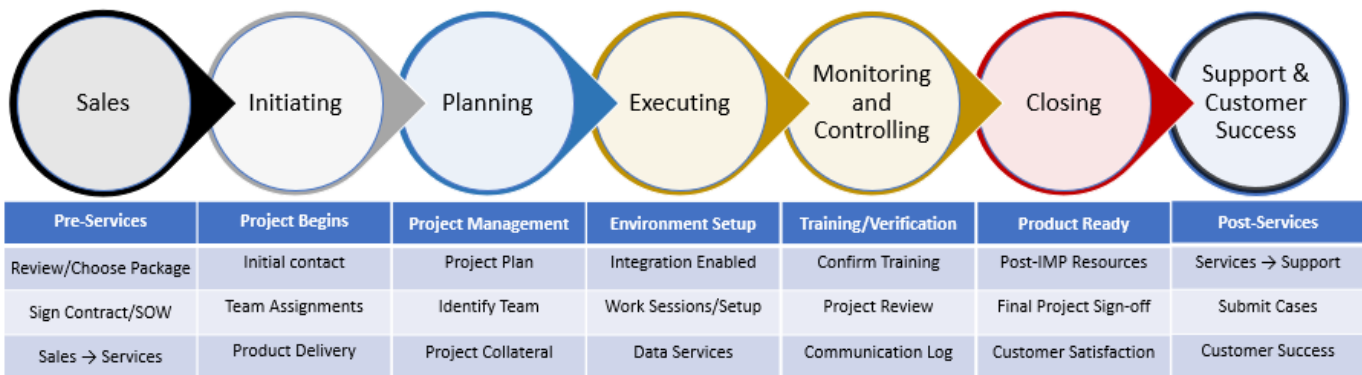
Purpose of Document

The purpose of this Statement of Work (“SOW”) between PowerSchool Group LLC (“PowerSchool”) and Customer (“You”, “Your”) is to outline the process, approach, and completion criteria for each step of the process to implement PowerSchool. This document covers the roles and responsibilities of the PowerSchool Project Manager, Implementation Specialist(s), and Customer in each step of the PowerSchool implementation process, serving as an outline of services PowerSchool is expected to deliver. This SOW calls out specific functional areas of PowerSchool that are covered for implementation services and level of coverage.

Successful implementation of new software requires proven project management and methodology. The timeline will be mutually adapted within a project management tool between PowerSchool and the Customer. PowerSchool provides a comprehensive package of services designed to ensure Your PowerSchool deployment project meets Your unique needs and expectations. Additional training, consulting and customization services can be purchased to help augment additional needs You may have with Your PowerSchool deployment. The delivery of Professional Services contained in this document will be provided remotely. If travel is required, all travel related expenses will be invoiced as incurred.

We will partner with You and be Your liaison to PowerSchool during the implementation. You will have a project team to help you, as a Customer, connect to other PowerSchool services and support, while also providing project planning, communication, project execution, and product specialist consulting. For a successful PowerSchool implementation, it is important that You understand the responsibilities, carve out the time required and keep on pace with the timeline. This will involve gathering information, helping Your team come to agreement on configuration and data standardization, your own product training and monitoring other staff assigned training for completion, adjusting desk level procedures, and planning for go live among several other tasks. The overall steps included in a project are outlined below.

This Statement of Work is subject to the terms and conditions of the current master agreement between the parties and any associated policies, pursuant to which PowerSchool has licensed the PowerSchool application to the Customer.



Released January 2021

Document Owner: PowerSchool Group LLC, Product Deployment Solutions

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General Assumptions

1. Implementation services will be delivered remotely unless onsite services are purchased separately.
2. Client is to provide a data extract to PowerSchool in accordance with Tiered Service package selected (if needed).
3. Implementation timeline is stated within the Planning Phase, extending the timeline may require the customer to purchase additional services.
4. Implementation services are completed when delivered and the deliverable acceptance procedure is complete.
5. Additional services are available and can be purchased for items out of the scope of implementation (see Project Change Control and Escalation Change Procedure section of this document).
6. Customer will adhere to the active PowerSchool Cancellation Policy. “Services Cancellation: Licensee shall pay a cancellation charge equal to fifty percent (50%) of the services fee and any non-refundable expenses incurred by PowerSchool if Licensee cancels any scheduled professional services less than fourteen (14) days before the occurrence of any service dates that PowerSchool has scheduled at Licensee’s request.”
7. Customer must identify a designated Customer project lead before the project kick-off meeting. The Customer project lead will be responsible for delivering all sections of the “Customer Responsibilities” included in the SOW in a complete manner within the project timeline.
8. The designated Customer project lead should be an employee of the organization implementing PowerSchool. Customers that hire third-party organizations to act on the behalf of the Customer for implementation may be required to sign a waiver form provided by PowerSchool, indicating that the third-party organization is authorized to act on the Customer’s behalf when interacting with PowerSchool. The Customer will be responsible for maintaining proper communication channels with third party organizations hired by the Customer.
9. All sign offs must be done by an employee and designated signatory of the Customer. Third party entities engaged by the Customer are not acceptable signatories for any project sign offs.
10. The PowerSchool Project Manager and/or Application Specialist will guide Customer to available procedures, guidelines, standards, reference materials and system/application documentation.
11. Implementation Services is assuming the product will be deployed as-is, items outside of Scope of Work must go through the change control procedures (see Project Change Control and Escalation Procedure in this document).

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Deliverables Acceptance Procedure

Deliverables Acceptance

This Statement of Work outlines PowerSchool deliverables for each phase of the implementation project in the PowerSchool Objections and Completion Criteria sections. Each deliverable will be reviewed and accepted in accordance with the following procedure:

- Deliverable will be submitted or delivered to the Customer project lead or designated Customer team member. It is the Customer project lead's responsibility to review and accept deliverable as complete.
- Within six (6) business days of completion of the project the Customer project lead will either accept the final deliverables or provide the PowerSchool implementation specialist a written list of objections. If no response from the Customer project lead is received within six (6) business days, then the deliverables will be deemed accepted, unless the Customer requests an extension.
- The PowerSchool implementation specialist will consider the Customer's objections within the context of PowerSchool's obligations as stated within this Statement of Work. Revisions agreed to by PowerSchool will be applied at which time the deliverables will be reviewed within six (6) business days and the Customer project lead either will accept the deliverables or provide the PowerSchool implementation specialist a written list of objections. If no response is received within six (6) business days, then the deliverables will be deemed accepted, unless the Customer requests an extension.
- Customer objections that are not agreed to by PowerSchool will be managed in accordance with the Project Change Control Procedure described below. If resolution is required to a conflict arising from Customer's objection to a deliverable, the Customer and PowerSchool will follow the Escalation Procedure described below.
- All deliverables required to be delivered hereunder are considered to be owned by PowerSchool with unlimited internal use by the Customer, unless otherwise noted.

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Project Change Control and Escalation Procedure

Project Change Control

The following process will be followed if additional services to this Statement of Work are required or desired.

- A Project Change Request (PCR) will be the vehicle for communicating change. The PCR must describe the change, rationale for the change and the effect the change will have on the project.
- The designated Customer project lead will review the proposed change and recommend it for further investigation or reject it. A PCR must be signed by the authorized Customer project lead to authorize quote for additional services. If the Customer accepts additional services and charges, a change to the original purchase order or new purchase order is required. Change to this Statement of Work through additional addendum will authorize additional scope and work.
- A written Change Authorization and/or PCR must be signed by authorized representatives from both parties to authorize implementation of the investigated changes. Until a change is agreed upon in writing, both parties will continue to act in accordance with the latest agreed version of the SOW.

Customer Escalation Procedure

The following procedure will be followed if resolution is required for a conflict arising during the project

- **Level 1:** Customer project lead will notify PowerSchool Project Manager via email with details of escalation.
- **Level 2:** If the PowerSchool Project Manager cannot provide resolution or path to resolution five (5) business days from receipt of level 1 escalation email, the Customer project lead will notify PowerSchool manager via email to – pmleadership@powerschool.com
- **Level 3:** If the concern remains unresolved after Level 2 intervention, resolution will be addressed in accordance with Project Change Control Procedure or termination of this SOW under the terms of the Contract.

During any resolution, PowerSchool agrees to provide services related to items not in dispute, to the extent practicable, pending resolution of the concern. The Customer agrees to pay invoices per the Contract, as rendered.

Released January 2021

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Unified Home Attendance Suite Statement of Work

Overview

This document serves as the Statement of Work (SOW) to define the scope of a PowerSchool Professional Services project. This SOW includes services for a single-district deployment of the following products, hosted in a PowerSchool cloud environment:

- UH Attendance Intervention Suite

All PowerSchool services for this SOW will be performed remotely.

Prerequisites

- If using SIS rostering via Clever or Classlink, you must have:
 - Customer SIS source system that is supported with an available Unified Home Attend SIS connector (Clever/Classlink).
 - Clever/Classlink SIS Rostering subscription.
- If not using SIS rostering via Clever/Classlink, customer must provide the necessary files in the required .csv format as defined in the Appendix.
- If using SIS, Customer approves the Application Specialist accessing SIS via Maintenance Access for duration of implementation.
- If using SIS, district must have contacts saved in PS SIS student contact table. If not, the customer must provide the necessary contact file in the required .csv format as defined in the Appendix.

Services in Scope

Initiating & Planning

PowerSchool Responsibilities

- Provision Environment
- Send welcome Email
- Identify PowerSchool Project Team
 - Project Manager
 - Application Specialist
 - Professional Development Specialist
 - Customer Success Manager
- Schedule Session One: Kickoff Meeting
- Data reviewed with Client for official rollout
- Finalize and approve Project Plan

Unified Home Attendance Suite

Statement of Work

Customer Responsibilities

- Identify Customer Project Team
 - Project Lead: primary point of contact for the PowerSchool team for the duration of the project; they will distribute tasks to the customer project team and will partner with PowerSchool to ensure the implementation remains on track and milestones are completed on time.
 - Professional Development Lead
 - Technical Lead: data administrator with administrative access to your SIS or student and staff data; they should also be familiar with creating data files.
- Attend Session One: Kickoff Meeting
- Finalize and approve Project Plan

Executing

PowerSchool Responsibilities

- Install and enable UH Plugin
- Conduct Session One: Kickoff Meeting
- Site Configuration based on customer provided data
 - District
 - Schools
 - Days Off
 - District Admins
 - Area Code
 - Features Purchased
 - Site Configuration Analysis
- Configure Middleware or API
- Configure (1) Postcard template
 - Two edits requests per template
 - Postcard to be sent manually
 - If automated postcards are required consulting hours are needed
- Implementation Imports
 - Implementation overview with Client
 - SIS (Data Source)
 - Configure sftp (if needed)
 - Daily Attendance
 - Attendance Codes
 - Schedules
 - Define Imports
 - Student Roster
 - Student Contact Data
 - Schedules
 - Post Import Analysis – Students and Contacts
 - Edits (if needed)
 - Post Import Analysis

Unified Home Attendance Suite

Statement of Work

Customer Responsibilities

- Attend Session One: Kickoff Meeting
- Complete Attendance Intervention Guide
- Implementation Imports
 - Implementation overview with Client
 - SIS (Data Source)
 - Configure sftp (if needed)
 - Daily Attendance
 - Attendance Codes
 - Schedules
 - Review imports
 - Student Roster
 - Student Contact Data
 - Schedules
 - Post Import Analysis – Students, Contacts, and Attendance Codes
 - Edits (if needed)
 - Client signoff
 - Post Import Analysis
 - Implementation Phase Complete

Monitoring and Controlling

PowerSchool Responsibilities

- Schedule Follow up meeting
- Client Testing updates and follow-ups as needed
- Status Updates/Follow-ups and Scheduled Periodic Calls
- Review Submitted Go Live Client Testing Checklist
- Confirm all critical cases are resolved

Customer Responsibilities

- Attend Follow-up call
- Perform final QA of system
- Approve Project closure

Unified Home Attendance Suite Statement of Work

Closing

PowerSchool Responsibilities

- Project close out call
- Review and verify completed project deliverables to finalize completion of project scope
- Introduce customer to Customer Education and Support contact methods
- Provide Confirmation of Deliverables document to customer for approval
- Provide Customer Satisfaction Survey
- Complete Lessons Learned

Customer Responsibilities

- Project close out call
- Review and verify completed deliverables to finalize completion of project scope
- Review and verify Support Contact methods and understand that support will be the primary contact at project completion
- Review Confirmation of Deliverables document and provide approval
- Contact Customer Education to schedule training
- Complete Customer Satisfaction Survey

Statement of Work Fees

This is a fixed-price SOW. Any services or deliverables not documented in this SOW can be addressed via a Project Change Request or a new SOW.

Unified Home Attendance Suite

Statement of Work

Appendix

Student Contact Information File Requirements

Unified Home matches parent contact data directly to the students they are associated with in your student information system.

Below are the required columns to integrate student contacts:

- Student ID
- Adult ID
- Adult First Name
- Adult Last Name
- Student Contact Flag (if applicable; optional)
- Relationship to student
- Cell Phone
- Email Address
- Language Preference

File Format Specifications

- Share in .csv format
- Escape columns with double quotes {""}

Staff Messaging Data File Requirements

All data files shared with Unified Home should be in .csv format with header rows included.

Below are the required columns to integrate staff messaging:

- Staff ID Number
- Staff Member First Name
- Staff Member Last Name
- Staff Member School Assignment
- Staff Member Email Address
- Staff Member Cell Phone Number

File Format Specifications

- Share in .csv format
- Escape columns with quotations {" "} if possible

Daily Attendance Data File Requirements

Each state or district has different requirements for defining a day of absenteeism which is calculated in your SIS. All data files shared with Unified Home must be in .csv format with header rows included.

Below are the required columns to integrate daily attendance:

Unified Home Attendance Suite Statement of Work

- Student ID
- School ID
- Date of Attendance Event
- Attendance Status (Some identification of: Excused Absent, Unexcused Absent, Tardy),
- Attendance Reason (Examples: "Quarantine", "Field Trip")
- Modification Timestamp (Optional)

File Format Specifications

- Share in .csv format
- Escape columns with quotations {“ ”} if possible

Direct to Student Contact Information File Requirements

Unified Home matches student contact data directly to the students profile based on the student ID in your student information system.

Below are the required columns to integrate student contacts:

- Student ID
- Student First name, Last name
- Cell Phone
- Email Address

File Format Specifications

- Share in .csv format
- Escape columns with double quotes {""}

Unified Insights Essentials Statement of Work

PS SIS

Overview

This document serves as the Statement of Work (SOW) to define the scope of a PowerSchool Professional Services project. This SOW includes services for a single-district deployment of the following products, hosted in a PowerSchool cloud environment:

- Unified Insights – Essentials (Qty 1)

All PowerSchool services for this SOW will be performed remotely.

Prerequisites

- Customer must be using PowerSchool SIS version 20.4.3 or higher in production, hosted in a PowerSchool cloud environment or accessible via a VPN service provided by PowerSchool.

Services in Scope

Initiating & Planning

- Host a project kickoff meeting with Customer to introduce project teams, review the scope of this SOW, and align project dates and resources.

Executing

- Coordinate with PowerSchool SaaS operations team for deployment of the Essentials – PS SIS
Hosted environment:
 - Cloud environment provisioning
 - Essentials application installation
 - PowerSchool AppSwitcher SSO implementation and configuration
 - Standard user roles inherited from PowerSchool SIS
 - SFTP folder setup for file exchange
 - Deployment of the following standard Unified Insights connectors:
 - PowerSchool SIS 2.0
 - Schoology (optional – will be deployed if Customer is using Schoology in production at the time of this SOW implementation project)
 - Note: This SOW includes deployment of the standard connectors only. Customizations and data extensions are not included in this SOW.
 - Deployment of standard Essentials dashboard content.
 - Note: This SOW includes deployment of the standard dashboard content only. Customizations are not included in this SOW.
 - Entities and data from source systems will be limited to Unified Insights application requirements. Data domains for this implementation will include up to the following:
 - Students; Schools; Basic Staff; Enrollment; Attendance; Assessment; Discipline; Courses; Curriculum, Period, and Final Marks; Student Schedules; Basic Special Education
 - Staff Online Activity; Student Online Activity; Tech Access (Optional – If Schoology connector is implemented)

Unified Insights Essentials Statement of Work

PS SIS

- US State & National Assessment data:
 - Customer will be introduced to the Assessment team and educated on the process of working with that team for initial and ongoing upload of standard supported US State and National assessment data, if applicable.
 - Note: Customer entitlement for standard assessment loading determined by terms of Customer's Essentials subscription service.
 - Loading of other assessment data beyond the standard supported assessments and formats can be performed by the Professional Services team and can be covered under a separate SOW or using KTO hours.
- Consulting
 - A Unified Insights – Strategic Solutions Consultant (SSC) will be assigned to assist Customer with understanding and adoption of their standard Essentials solution. SSC sessions with the Customer will include the following topics:
 - Post-kickoff system demo for Customer project team to educate on system functionality and capabilities, and to review SOW milestones
 - Review of Customer operations and expected use cases for Essentials
 - Post-implementation system walkthrough using live Customer data
 - Best practices for system use and adoption
 - Discussion of potential areas for future system expansion or customization

Monitoring

- Perform final system QA
- User Training:
 - Deliver standard instructor-led Essentials User Training
 - Total hours included in this SOW for User Training are specified on Customer's quote

Closing

- Perform Support handoff and project close

Ongoing Project Management

- Project Planning; Project Communication; Status Reporting; Resource Scheduling; Resource Management; Risk Management; Issue Management

Unified Insights Essentials Statement of Work

PS SIS

Customer Responsibilities

- Assign a Project Manager to act as the single point of contact to PowerSchool for coordination of Customer resources and execution of this SOW. Assign additional technical and business stakeholders as required to complete the work and validate the solution.
- Provide access for PowerSchool to source systems to enable implementation and configuration of PowerSchool connector for extracting data from source systems to load into Unified Insights.
- Assist with validation of source system data and dashboard metrics.
- Validate AppSwitcher SSO between Essentials and PS SIS
- Validate user roles inherited from PS SIS
- Participate in Consulting.
- Participate in User Training.
- Assist with final system QA and provide final system acceptance for go-live.

SOW Fees

This is a fixed-price SOW. Any services or deliverables not documented in this SOW can be addressed via a Project Change Request or a new SOW.

Coversheet

Approval of SARC

Section: VII. Governance
Item: A. Approval of SARC
Purpose: Vote
Submitted by:
Related Material: 2021-2022 School Accountability Report Card (SARC).pdf

Community School for Creative Education

2021–22 School Accountability Report Card

Reported Using Data from the 2021–22 School Year

California Department of Education

Address: 2111 International Blvd
Oakland, CA , 94606

Principal: Philip Gedeon

Phone: 5106864131

Grade Span:

By February 1 of each year, every school in California is required by state law to publish a School Accountability Report Card (SARC). The SARC contains information about the condition and performance of each California public school. Under the Local Control Funding Formula (LCFF) all local educational agencies (LEAs) are required to prepare a Local Control and Accountability Plan (LCAP), which describes how they intend to meet annual school-specific goals for all pupils, with specific activities to address state and local priorities. Additionally, data reported in an LCAP is to be consistent with data reported in the SARC.

- For more information about SARC requirements and access to prior year reports, see the California Department of Education (CDE) SARC web page at <https://www.cde.ca.gov/ta/ac/sa/>.
- For more information about the LCFF or LCAP, see the CDE LCFF web page at <https://www.cde.ca.gov/fg/aa/lc/>.
- For additional information about the school, parents/guardians and community members should contact the school principal or the district office.

DataQuest

DataQuest is an online data tool located on the CDE DataQuest web page at <https://dq.cde.ca.gov/dataquest/> that contains additional information about this school and comparisons of the school to the district and the county. Specifically, DataQuest is a dynamic system that provides reports for accountability (e.g., test data, enrollment, high school graduates, dropouts, course enrollments, staffing, and data regarding English learners).

California School Dashboard

The California School Dashboard (Dashboard) <https://www.caschooldashboard.org/> reflects California's new accountability and continuous improvement system and provides information about how LEAs and schools are meeting the needs of California's diverse student population. The Dashboard contains reports that display the performance of LEAs, schools, and student groups on a set of state and local measures to assist in identifying strengths, challenges, and areas in need of improvement.

Internet Access

Internet access is available at public libraries and other locations that are publicly accessible (e.g., the California State Library). Access to the Internet at libraries and public locations is generally provided on a first-come, first-served basis. Other use restrictions may include the hours of operation, the length of time that a workstation may be used (depending on availability), the types of software programs available on a workstation, and the ability to print documents.

About This School

Philip Gedeon

Principal, Community School for Creative Education

About Our School



Contact

Community School for Creative Education
2111 International Blvd
Oakland, CA 94606

Phone: 5106864131

Email: phillipg@communityschoolforcreativeeducation.org

Contact Information (School Year 2022–23)

District Contact Information (School Year 2022–23)

District Name	Community School for Creative Education
Phone Number	5106864131
Superintendent	Monroe, L.K.
Email Address	lkmonroe@acoe.org
Website	http://communityschoolforcreativeeducation.org

School Contact Information (School Year 2022–23)

School Name	Community School for Creative Education
Street	2111 International Blvd
City, State, Zip	Oakland, CA , 94606
Phone Number	5106864131
Principal	Philip Gedeon
Email Address	http://communityschoolforcreativeeducation.org
Website	http://communityschoolforcreativeeducation.org
County-District-School (CDS) Code	01100170123968

Last updated: 1/26/23

School Description and Mission Statement (School Year 2022–23)

We are the country's first Transitional K - 8 Grade Intercultural Public Waldorf School. We are a Standards-Aligned, Equity- Focused Charter. Oakland Community Organizations is our founding and key partner.

Our Vision Is:

The Community School for Creative Education envisions a future in which: all children have access to quality education; all children experience success in community and career; and youth voices contribute in valued and meaningful ways to the success of an thriving, equitable, and multi-cultural society.

Our Mission Is:

To achieve our vision, the Community School for Creative Education is a TK through 8th grade charter school that partners with families and communities to serve the richly diverse students of Oakland, California. The school is committed to promoting equity in education by providing a rigorous, standards-based academic program integrated into a culturally rich, arts-infused curriculum and guided by ongoing assessment. Through nurturing the whole child – head, heart, and hands – our school prepares o culturally competent, o well-rounded, o lifelong learners and leaders to be college-ready, confident and culturally competent, and prepared to lead, contribute to, and successfully participate in our rapidly changing multicultural society.

CSCE Mission and "What Do We Stand For"

Our Mission is inspired by the Rudolf Steiner Waldorf methodology to partner with families and communities to provide a rigorous, highly personalized, college preparatory program integrated into a culturally rich, arts-infused curriculum for the diverse students of Oakland to promote equity and prepare culturally competent, ell-rounded lifelong learners to lead, contribute to and successfully participate in our rapidly changing, multicultural society Community School for Creative Education.

The School Rests On Three Pillars: We commit to:

- Provide a Common-Core -aligned curriculum
- Be inspired by Waldorf principles
- Stay focused on Equity & create change in our society's structure by helping all children to succeed in school and in life.

These pillars provide the school's foundation and direction.

We commit to knitting these together as a professional learning community continuously refining and reflecting on data as we go. We Recognize Learning to Read as a Key Portal on the Path: We recognize: Learning to read well is the cornerstone of creating equitable outcomes for our children. We do it through integration of:

- Direct and systematic phonics instruction, close reading, guided reading, shared reading and interactive reading in Reader's and Writer's workshop (see Renewal, p 20);
- Core Waldorf practices: Teaching through the artistic; employing main lesson; main lesson book; reinforcement through subjects. (CSCE Renewal, p. 20 & p.25) We follow cutting-edge learning theory by drawing from Waldorf practices in our lesson design which moves from whole (the story) to part (direct instruction) and back to whole (the artistic activity).

We Aim To Be Preventive Rather Than Reactive: The aim of CSCE is to focus on prevention, intervention and acceleration of all students. To achieve this goal, we are committed to create a process similar to Response to Intervention (RTI) and Positive Behavior Interventions and Supports (PBIS) that together provide staff a routine systematic way to identify students in need early on so they can be provided with appropriate interventions.

Our Accountability is To Ourselves: We commit to conducting ongoing inquiry together around focus areas, collecting data and reflecting on outcomes (Cycle of Inquiry). By inquiring and assessing frequently, regularly and using multiple measures (CSCE Renewal, p. 52-59) we learn how to do our work better. We engage multiple modalities and interdisciplinary curriculum drawing from Waldorf.

Our goal is to: Meet Common-Core Standards: 80% of 5th graders and beyond will meet or exceed standards in both English Language Arts and Math. Specifically, in reading, our target is:

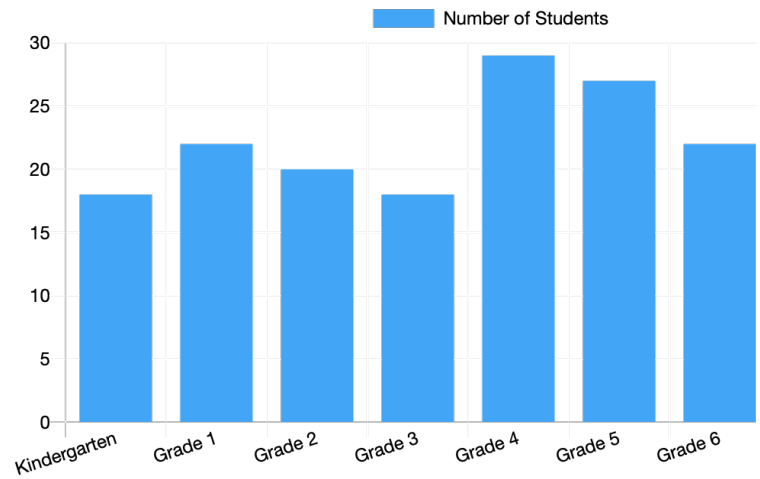
- by end of first grade, a fluency rate of 60 words per minute
- by end of third grade, a fluency rate of 110 words per minute
- by end of fifth grade , a fluency rate of 140 words per minutes (see Renewal, pp. 27-28)

Do that and more: Develop life-long leaders by harnessing Waldorf inspired methods Do that for all: Both those who are "school dependent" and those who are not

Last updated: 1/26/23

Student Enrollment by Grade Level (School Year 2021–22)

Grade Level	Number of Students
Kindergarten	18
Grade 1	22
Grade 2	20
Grade 3	18
Grade 4	29
Grade 5	27
Grade 6	22
Grade 7	22
Grade 8	24
Total Enrollment	202



Minimum students was not met in the provided examples. Future development will include messages on the table to explain what the minimums are to display data.

Last updated: 1/26/23

Student Enrollment by Student Group (School Year 2021–22)

Student Group	Percent of Total Enrollment
Female	46.50%
Male	53.50%
Non-Binary	0.00%
American Indian or Alaska Native	0.50%
Asian	10.90%
Black or African American	16.80%
Filipino	1.00%
Hispanic or Latino	60.40%
Native Hawaiian or Pacific Islander	0.50%
Two or More Races	5.00%
White	1.50%

Student Group (Other)	Percent of Total Enrollment
English Learners	49.50%
Foster Youth	0.00%
Homeless	0.50%
Migrant	0.00%
Socioeconomically Disadvantaged	89.60%
Students with Disabilities	19.30%

A. Conditions of Learning

State Priority: Basic

The SARC provides the following information relevant to the State priority: Basic (Priority 1):

- Degree to which teachers are appropriately assigned and fully credentialed in the subject area and for the pupils they are teaching;
- Pupils have access to standards-aligned instructional materials; and
- School facilities are maintained in good repair

Teacher Preparation and Placement (School Year 2020–21)

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)	0.00	0.00	115.90	57.84	228366.10	83.12
Intern Credential Holders Properly Assigned	0.00	0.00	3.00	1.50	4205.90	1.53
Teachers Without Credentials and Misassignments ("ineffective" under ESSA)	8.00	100.00	41.00	20.49	11216.70	4.08
Credentialed Teachers Assigned Out-of-Field ("out-of-field" under ESSA)	0.00	0.00	38.90	19.45	12115.80	4.41
Unknown	0.00	0.00	1.40	0.71	18854.30	6.86
Total Teaching Positions	8.00	100.00	200.40	100.00	274759.10	100.00

Note: The data in this table is based on Full Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

Last updated: 1/25/23

Teacher Preparation and Placement (School Year 2021–22)

Authorization/Assignment	School Number	School Percent	District Number	District Percent	State Number	State Percent
Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)						
Intern Credential Holders Properly Assigned						
Teachers Without Credentials and Misassignments ("ineffective" under ESSA)						
Credentialed Teachers Assigned Out-of-Field ("out-of-field" under ESSA)						
Unknown						
Total Teaching Positions						

Note: The data in this table is based on Full Time Equivalent (FTE) status. One FTE equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time. Additionally, an assignment is defined as a position that an educator is assigned based on setting, subject, and grade level. An authorization is defined as the services that an educator is authorized to provide to students.

Last updated: 1/25/23

**Teachers Without Credentials and Misassignments
 (considered "ineffective" under ESSA)**

Authorization/Assignment	2020-21 Number	2021-22 Number
Permits and Waivers	0.00	
Misassignments	8.00	
Vacant Positions	0.00	
Total Teachers Without Credentials and Misassignments	8.00	

Last updated: 1/11/23

**Credentialed Teachers Assigned Out-of-Field
 (considered "out-of-field" under ESSA)**

Indicator	2020-21 Number	2021-22 Number
Credentialed Teachers Authorized on a Permit or Waiver	0.00	
Local Assignment Options	0.00	
Total Out-of-Field Teachers	0.00	

Last updated: 1/11/23

Class Assignments

Indicator	2020- 21 Percent	2021- 22 Percent
Misassignments for English Learners (a percentage of all the classes with English learners taught by teachers that are misassigned)	100.00	
No credential, permit or authorization to teach (a percentage of all the classes taught by teachers with no record of an authorization to teach)	35.70	

Note: For more information refer to the Updated Teacher Equity Definitions web page at <https://www.cde.ca.gov/pd/ee/teacherequitydefinitions.asp>.

Last updated: 1/11/23

Quality, Currency, Availability of Textbooks and Other Instructional Materials (School Year 2022–23)

Year and month in which the data were collected: January 2022

Subject	Textbooks and Other Instructional Materials/year of Adoption	From Most Recent Adoption?	Percent Students Lacking Own Assigned Copy
Reading/Language Arts	Imagine Learning - EL Education	Yes	0%
Mathematics	Eureka Math	Yes	0%
Science	Elementary: Imagine Learning - EL Education Middle School: ThinkLink - Foss Kit	Yes	0%
History-Social Science	History Alive	Yes	0%
Foreign Language	N/A		0%
Health	Middle School: Teacher Created		0%
Visual and Performing Arts	N/A		0%
Science Lab Eqpmt (Grades 9-12)	N/A	N/A	0%

Note: Cells with N/A values do not require data.

Last updated: 1/25/23

School Facility Conditions and Planned Improvements

Last updated:

School Facility Good Repair Status

Using the **most recently collected** Facility Inspection Tool (FIT) data (or equivalent), provide the following:

- Determination of repair status for systems listed
- Description of any needed maintenance to ensure good repair
- The year and month in which the data were collected
- The rate for each system inspected
- The overall rating

Year and month of the most recent FIT report: Not Available

System Inspected	Rating	Repair Needed and Action Taken or Planned
Systems: Gas Leaks, Mechanical/HVAC, Sewer		
Interior: Interior Surfaces		
Cleanliness: Overall Cleanliness, Pest/Vermin Infestation		
Electrical: Electrical		
Restrooms/Fountains: Restrooms, Sinks/Fountains		
Safety: Fire Safety, Hazardous Materials		
Structural: Structural Damage, Roofs		
External: Playground/School Grounds, Windows/Doors/Gates/Fences		

Overall Facility Rate

Year and month of the most recent FIT report: Not Available

Overall Rating

Last updated: 1/1/01

B. Pupil Outcomes

State Priority: Pupil Achievement

The SARC provides the following information relevant to the State priority: Pupil Achievement (Priority 4):

- Statewide assessments** (i.e., California Assessment of Student Performance and Progress [CAASPP] System includes the Smarter Balanced Summative Assessments for students in the general education population and the California Alternate Assessments [CAAs] for English language arts/literacy [ELA] and mathematics given in grades three through eight and grade eleven. Only eligible students may participate in the administration of the CAAs. CAAs items are aligned with alternate achievement standards, which are linked with the Common Core State Standards [CCSS] for students with the most significant cognitive disabilities).

The CAASPP System encompasses the following assessments and student participation requirements:

- Smarter Balanced Summative Assessments and CAAs for ELA** in grades three through eight and grade eleven.
- Smarter Balanced Summative Assessments and CAAs for mathematics** in grades three through eight and grade eleven.
- California Science Test (CAST) and CAAs for Science** in grades five, eight, and once in high school (i.e., grade ten, eleven, or twelve).

- College and Career Ready:** The percentage of students who have successfully completed courses that satisfy the requirements for entrance to the University of California and the California State University, or career technical education sequences or programs of study.

CAASPP Test Results in ELA and Mathematics for All Students Grades Three through Eight and Grade Eleven taking and completing a state-administered assessment Percentage of Students Meeting or Exceeding the State Standard

Subject	School 2020–21	School 2021–22	District 2020–21	District 2021–22	State 2020–21	State 2021–22
English Language Arts / Literacy (grades 3-8 and 11)	N/A	18%	N/A	46%	N/A	47%
Mathematics (grades 3-8 and 11)	N/A	12%	N/A	34%	N/A	33%

Note: Where it was the most viable option, in 2020–21, LEAs were required to administer the statewide summative assessment in ELA and mathematics and where a statewide summative assessment was not the most viable option for the LEA, LEAs were permitted report results from a different assessment that meets the criteria established by the California State Board of Education on March 16, 2021. The 2020–21 data cells for the school, district, state have N/A values because these data are not comparable to 2021–22 data.

Note: Percentages are not calculated when the number of students tested is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Note: ELA and Mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The "Percent Met or Exceeded" is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3-Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Last updated: 1/26/23

**CAASPP Test Results in ELA by Student Group for students taking and completing a state-administered assessment
 Grades Three through Eight and Grade Eleven
 (School Year 2021–22)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	137	136	99.27	0.73	18.38
Female	64	63	98.44	1.56	22.22
Male	73	73	100.00	0.00	15.07
American Indian or Alaska Native	--	--	--	--	--
Asian	--	--	--	--	--
Black or African American	20	20	100.00	0.00	15.00
Filipino	--	--	--	--	--
Hispanic or Latino	90	89	98.89	1.11	15.73
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	12	12	100.00	0.00	16.67
White	--	--	--	--	--
English Learners	70	69	98.57	1.43	7.25
Foster Youth	0	0	0	0	0
Homeless					
Military	0	0	0	0	0
Socioeconomically Disadvantaged	126	125	99.21	0.79	16.00
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	34	34	100.00	0.00	11.76

Note: ELA test results include the Smarter Balanced Summative Assessment and the CAA. The "Percent Met or Exceeded" is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Note: Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

Last updated: 1/25/23

**CAASPP Test Results in Mathematics by Student Group for students taking and completing a state-administered assessment
 Grades Three through Eight and Grade Eleven
 (School Year 2021–22)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	137	136	99.27	0.73	11.76
Female	64	63	98.44	1.56	11.11
Male	73	73	100.00	0.00	12.33
American Indian or Alaska Native	--	--	--	--	--
Asian	--	--	--	--	--
Black or African American	20	20	100.00	0.00	5.00
Filipino	--	--	--	--	--
Hispanic or Latino	90	89	98.89	1.11	7.87
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	12	12	100.00	0.00	8.33
White	--	--	--	--	--
English Learners	70	69	98.57	1.43	2.90
Foster Youth	0	0	0	0	0
Homeless				--	
Military	0	0	0	0	0
Socioeconomically Disadvantaged	126	125	99.21	0.79	11.20
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	34	34	100.00	0.00	8.82

Note: Mathematics test results include the Smarter Balanced Summative Assessment and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the Smarter Balanced Summative Assessment plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Note: Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

Last updated: 1/25/23

CAASPP Test Results in Science for All Students
Grades Five, Eight and High School
Percentage of Students Meeting or Exceeding the State Standard

Subject	School 2020–21	School 2021–22	District 2020–21	District 2021–22	State 2020–21	State 2021–22
Science (grades 5, 8, and high school)	N/T	14.89	0.00		28.72	29.47

Note: Science test results include the CAST and the CAA. The “Percent Met or Exceeded” is calculated by taking the total number of students who met or exceeded the standard on the CAST plus the total number of students who met the standard (i.e., achieved Level 3–Alternate) on the CAAs divided by the total number of students who participated in both assessments.

Note: For any 2020–21 data cells with N/T values indicate that this school did not test students using the CAASPP for Science.

Note: The number of students tested includes all students who participated in the test whether they received a score or not; however, the number of students tested is not the number that was used to calculate the achievement level percentages. The achievement level percentages are calculated using only students who received scores.

Last updated: 1/25/23

CAASPP Test Results in Science by Student Group
Grades Five, Eight and High School (School Year 2021–22)

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	48	47	97.92	2.08	14.89
Female	22	21	95.45	4.55	14.29
Male	26	26	100.00	0.00	15.38
American Indian or Alaska Native	0	0	0	0	0
Asian	--	--	--	--	--
Black or African American	--	--	--	--	--
Filipino	0	0	0	0	0
Hispanic or Latino	33	32	96.97	3.03	12.50
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	--	--	--	--	--
White	0	0	0	0	0
English Learners	21	20	95.24	4.76	5.00
Foster Youth	0	0	0	0	0
Homeless					
Military	0	0	0	0	0
Socioeconomically Disadvantaged	42	41	97.62	2.38	14.63
Students Receiving Migrant Education Services	0	0	0	0	0
Students with Disabilities	11	11	100.00	0.00	27.27

Note: Double dashes (--) appear in the table when the number of students is ten or less, either because the number of students in this category is too small for statistical accuracy or to protect student privacy.

Last updated: 1/25/23

State Priority: Other Pupil Outcomes

The SARC provides the following information relevant to the State priority: Other Pupil Outcomes (Priority 8):

- Pupil outcomes in the subject area of physical education

C. Engagement

State Priority: Parental Involvement

The SARC provides the following information relevant to the State priority: Parental Involvement (Priority 3):

- Efforts the school district makes to seek parent input in making decisions regarding the school district and at each school site

Opportunities for Parental Involvement (School Year 2022–23)

Our parents are our children's first teachers. The school works in partnership with the parents.

Key avenues for involvement are:

Ongoing volunteer opportunities:

- classroom reps
- participation in any classroom is encouraged

Weekly meetings include:

- presenting at an Assembly
- participation in parent and principal and executive director tea after weekly Assembly

Monthly meetings include:

- Parent Meeting (build on research tested Head Start model of parent empowerment)
 - Break the Ice; Cultural Humility meetings with families and staff and community
 - Fundraising
 - School Site Council
 - Food Bank
-

State Priority: Pupil Engagement

The SARC provides the following information relevant to the State priority: Pupil Engagement (Priority 5):

- High school dropout rates;
- High school graduation rates; and
- Chronic Absenteeism

**Chronic Absenteeism by Student Group
 (School Year 2021–22)**

Student Group	Cumulative Enrollment	Chronic Absenteeism Eligible Enrollment	Chronic Absenteeism Count	Chronic Absenteeism Rate
All Students	226	211	131	62.1
Female	106	98	57	58.2
Male	120	113	74	65.5
American Indian or Alaska Native	1	1	0	0.0
Asian	23	23	6	26.1
Black or African American	36	32	25	78.1
Filipino	2	2	1	50.0
Hispanic or Latino	138	128	83	64.8
Native Hawaiian or Pacific Islander	1	1	1	100.0
Two or More Races	11	11	9	81.8
White	3	3	1	33.3
English Learners	114	110	63	57.3
Foster Youth	1	1	1	100.0
Homeless	1	1	1	100.0
Socioeconomically Disadvantaged	196	189	121	64.0
Students Receiving Migrant Education Services	0	0	0	0.0
Students with Disabilities	47	45	30	66.7

Last updated: 1/25/23

State Priority: School Climate

The SARC provides the following information relevant to the State priority: School Climate (Priority 6):

- Pupil suspension rates;
- Pupil expulsion rates; and
- Other local measures on the sense of safety

Suspensions and Expulsions for School Year 2019–20 Only

(data collected between July through February, partial school year due to the COVID-19 pandemic)

Rate	School 2019–20	District 2019–20	State 2019–20
Suspensions	1.30%	1.41%	2.45%
Expulsions	0.00%	0.00%	0.05%

Note: The 2019–20 suspensions and expulsions rate data are not comparable to other year data because the 2019–20 school year is a partial school year due to the COVID-19 crisis. As such, it would be inappropriate to make any comparisons in rates of suspensions and expulsions in the 2019–20 school year compared to other school years.

Suspensions and Expulsions

(data collected between July through June, each full school year respectively)

Rate	School 2020–21	School 2021–22	District 2020–21	District 2021–22	State 2020–21	State 2021–22
Suspensions	0.00%	0.88%	0.02%	2.97%	0.20%	3.17%
Expulsions	0.00%	0.00%	0.00%	0.00%	0.00%	0.07%

Note: Data collected during the 2020–21 school year may not be comparable to earlier years of this collection due to differences in learning mode instruction in response to the COVID-19 pandemic.

Last updated: 1/25/23

**Suspensions and Expulsions by Student Group
 (School Year 2021–22)**

Student Group	Suspensions Rate	Expulsions Rate
All Students	0.88	0.00
Female	0.00	0.00
Male	1.67	0.00
Non-Binary	0.00	0.00
American Indian or Alaska Native	0.00	0.00
Asian	0.00	0.00
Black or African American	0.00	0.00
Filipino	0.00	0.00
Hispanic or Latino	0.00	0.00
Native Hawaiian or Pacific Islander	0.00	0.00
Two or More Races	9.09	0.00
White	0.00	0.00
English Learners	0.00	0.00
Foster Youth	0.00	0.00
Homeless	0.00	0.00
Socioeconomically Disadvantaged	0.51	0.00
Students Receiving Migrant Education Services	0.00	0.00
Students with Disabilities	2.13	0.00

Last updated: 1/25/23

School Safety Plan (School Year 2022–23)

The school has emergency drills on a regular schedule (e.g., earthquake, fire, shelter in place). Emergency exit maps are posted in each room. Plans are reviewed with the staff each August before the beginning of school. Plans are reviewed prior to each month's drill and reviewed to ensure best practices are being upheld.-----

Last Reviewed, Updated, and Discussed by CSCE Board of Directors on October 13, 2022.

Last Reviewed with Staff on October 19, 2022.

Last updated: 1/25/23

D. Other SARC information

The information in this section is required to be in the SARC but is not included in the state priorities for LCFF.

Average Class Size and Class Size Distribution (Elementary) School Year 2019–20

Grade Level	Average Class Size	Number of Classes* 1-20	Number of Classes* 21-32	Number of Classes* 33+
K	21.00		1	
1	32.00		1	
2				
3				
4				
5				
6	28.00		1	
Other**	30.00		5	

* Number of classes indicates how many classes fall into each size category (a range of total students per class).

** "Other" category is for multi-grade level classes.

Average Class Size and Class Size Distribution (Elementary) School Year 2020–21

Grade Level	Average Class Size	Number of Classes* 1-20	Number of Classes* 21-32	Number of Classes* 33+
K	29.00		1	
1	26.00		1	
2	26.00		1	
3	29.00		1	
4	31.00		1	
5	26.00		1	
6	33.00			
Other**				

* Number of classes indicates how many classes fall into each size category (a range of total students per class).

** "Other" category is for multi-grade level classes.

Average Class Size and Class Size Distribution (Elementary) School Year 2021–22

Grade Level	Average Class Size	Number of Classes* 1-20	Number of Classes* 21-32	Number of Classes* 33+
K	18.00	1		
1	22.00		1	
2	20.00	1		
3	18.00	1		
4	29.00		1	
5	27.00		1	
6	22.00		1	
Other**				

* Number of classes indicates how many classes fall into each size category (a range of total students per class).

** "Other" category is for multi-grade level classes.

Average Class Size and Class Size Distribution (Secondary) (School Year 2019–20)

Subject	Average Class Size	Number of Classes* 1-22	Number of Classes* 23-32	Number of Classes* 33+
English Language Arts				
Mathematics				
Science				
Social Science				

* Number of classes indicates how many classrooms fall into each size category (a range of total students per classroom). At the secondary school level, this information is reported by subject area rather than grade level.

Average Class Size and Class Size Distribution (Secondary) (School Year 2020–21)

Subject	Average Class Size	Number of Classes* 1-22	Number of Classes* 23-32	Number of Classes* 33+
English Language Arts	27.00	1	2	
Mathematics	27.00	1	2	
Science	27.00	1	2	
Social Science	27.00	1	2	

* Number of classes indicates how many classrooms fall into each size category (a range of total students per classroom). At the secondary school level, this information is reported by subject area rather than grade level.

Average Class Size and Class Size Distribution (Secondary) (School Year 2021–22)

Subject	Average Class Size	Number of Classes* 1-22	Number of Classes* 23-32	Number of Classes* 33+
English Language Arts				
Mathematics				
Science				

Social Science

* Number of classes indicates how many classrooms fall into each size category (a range of total students per classroom). At the secondary school level, this information is reported by subject area rather than grade level.

Last updated: 1/25/23

Ratio of Pupils to Academic Counselor (School Year 2021–22)

Title	Ratio
Pupils to Academic Counselor*	.00

* One full time equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time.

Last updated: 1/25/23

Student Support Services Staff (School Year 2021–22)

Title	Number of FTE* Assigned to School
Counselor (Academic, Social/Behavioral or Career Development)	
Library Media Teacher (Librarian)	
Library Media Services Staff (Paraprofessional)	
Psychologist	
Social Worker	
Nurse	
Speech/Language/Hearing Specialist	
Resource Specialist (non-teaching)	2.00
Other	1.00

* One full time equivalent (FTE) equals one staff member working full time; one FTE could also represent two staff members who each work 50 percent of full time.

Last updated: 1/25/23

Expenditures Per Pupil and School Site Teacher Salaries (Fiscal Year 2020–21)

Level	Total Expenditures Per Pupil	Expenditures Per Pupil (Restricted)	Expenditures Per Pupil (Unrestricted)	Average Teacher Salary
School Site	\$12241.00	\$0.00	\$12241.00	\$53275.00
District	N/A	N/A	--	\$0.00
Percent Difference – School Site and District	N/A	N/A	--	--
State	N/A	N/A	\$6593.62	--
Percent Difference – School Site and State	N/A	N/A	--	--

Note: Cells with N/A values do not require data.

Last updated: 1/27/23

Advanced Placement (AP) Courses (School Year 2021–22)

Percent of Students in AP Courses

Subject	Number of AP Courses Offered*
Computer Science	0
English	0
Fine and Performing Arts	0
Foreign Language	0
Mathematics	0
Science	0
Social Science	0
Total AP Courses Offered*	0.00%

* Where there are student course enrollments of at least one student.

Last updated: 1/25/23

Professional Development

Measure	2020–21	2021–22	2022–23
Number of school days dedicated to Staff Development and Continuous Improvement	12	12	13

Last updated: 1/25/23

Coversheet

Form 700 Presentation

Section: VIII. Board Retreat
Item: I. Form 700 Presentation
Purpose: FYI
Submitted by:
Related Material: Form 700 Presentation.pdf
Form 700.pdf

Form 700 Presentation - Due April 1, 2023

What is Form 700?

- In the aftermath of Watergate (1974) CA voters passed Prop 9, know as the Political Reform Act. The Fair Political Practices Commission (FPPC) was created to administer and enforce this landmark ethics law.
- Form 700 has been required of elected state officers, judges, state board and commission members, legislative staffers, and traditional school board members (among others) for decades.
- SB 126 (2019) made this disclosure mandatory for all charter school board members.
- Form 700 discloses financial interests to elected officials and public employees.
- Forms will be filed with a board member's charter school (keep on hand for up to seven years).
- **This is a PUBLIC DOCUMENT.** Everything written here may be viewed by the public and the press.

Form 700 Presentation

Instructions

- If you are in doubt about whether to disclose something, the conservative answer is to disclose it.
- You only need to report as much as your disclosure category(ies) in your conflict of interest code requires.
- Generally, you disclose a financial interest only once on the Form. You should not double report it.
- The document must be typed or printed in ink.
- Save the Schedule Summary for the end; complete the cover page last.
- Remember to sign the statement.
- You may use the school's mailing address rather than your home address.

Form 700 Presentation - Schedule A-1

- If you have a business located in, doing business in or planning to do business in your charter school's jurisdiction and that business is owned by you, your spouse or registered domestic partner or your dependent children AND it had a total benefit of \$2,000 or more, you need to report that interest on this schedule.
- Reportable investments include: stocks and bonds, family farms, and even a 10% or greater interest in a living trust.
- You do NOT need to report:
 - Diversified mutual funds
 - Insurance policies
 - Money in a checking or savings account
 - CalPERS/CalSTRS accounts
 - Retirement accounts (non-reportable interest)

Form 700 Presentation - Schedule A-2

- On this schedule you MUST report:
 - Your business or your spouse's business (community property)
 - Family trust
 - Partnership interests
 - Rental property held by a business or trust
 - Stocks

- You do NOT need to report:
 - Insurance policies
 - Government bonds
 - Your personal residence
 - Vacation properties used for leisure and not rental
 - CalPERS/CalSTRS accounts

Form 700 Presentation - Schedule B - Real Property

- What is “real property?”
 - It has to be within, or located within two miles outside the boundaries of the jurisdiction of the charter school.
 - Real Property can include a deed of trust, an easement or an option to acquire property. It can also include a mining lease or an interest in real property that you, your spouse or your minor children own at least a 10% share in.
- You do NOT need to report:
 - You are NOT required to report a home or vacation cabin used exclusively as a residence. But if you rent out rooms in the vacation cabin, the portion claimed as a tax deduction is reportable.
 - You are not required to report your own personal residence.

Form 700 Presentation - Schedule C - Income, Loans & Business Positions

- Report the source and amount of gross income you or your spouse received if:
 - it was over \$500 gross income and
 - it is from an entity outlined in your charter school's conflict of interest code, or
 - it is from an entity that does business in your jurisdiction
- This may be salary/wages, per diem, or reimbursement for expenses including travel payments provided by your employer.
- Repayment of loans made to others.
- May also be commission income, prizes or awards, gross income from the sale of a car or house.

Form 700 Presentation - Schedule C - Income, Loans & Business Positions

- You do NOT need to report:
 - Government income (state, federal, local)
 - Stock dividends or sale
 - Income from PERS/STRS
 - Inheritance
 - Income earned by dependent children
 - Alimony or child support payments
 - Loans made to others

Form 700 Presentation - Schedule D - Gifts

- Reportable Interests:
 - Accepting a gift – even if you don't use it, makes it reportable.
 - A gift is reportable if its fair market value is \$50 or more.
 - The gift limit is \$520 (2021) from a single source
 - Gifts from lobbyists are limited to \$10 per month
 - Commonly reportable gifts include: tickets or passes to events, food, beverages and accommodations, wedding gifts, forgiveness of a loan received by you
- You do NOT need to report:
 - Gifts of similar value exchanged on birthdays, holidays, etc.
 - Unused gifts returned within 30 days
 - Informational material to help you in your work
 - SWAG at an event where you speak
 - Plaques or trophies valued less than \$250
 - Disaster relief

Form 700 Presentation - Schedule E - Gifts, Travel Payments, Advances, and Reimbursements

- You are NOT required to report travel payments from government agencies if you have provided services of equal or greater value than the payment.
- You are NOT required to disclose travel payments received from your employer in the normal course of your employment.
- You ARE required to report travel payments that are gifts – if you did not provide services equal to or greater in value than payments received.
- When reporting travel payments as income, you have the burden of proving income and describing services.



STATEMENT OF ECONOMIC INTERESTS

COVER PAGE

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)

1. Office, Agency, or Court

Agency Name *(Do not use acronyms)* _____
 Division, Board, Department, District, if applicable _____ Your Position _____

► If filing for multiple positions, list below or on an attachment. *(Do not use acronyms)*

Agency: _____ Position: _____

2. Jurisdiction of Office *(Check at least one box)*

State _____	Judge, Retired Judge, Pro Tem Judge, or Court Commissioner <i>(Statewide Jurisdiction)</i>
Multi-County _____	County of _____
City of _____	Other _____

3. Type of Statement *(Check at least one box)*

Annual: The period covered is January 1, 2022, through December 31, 2022. -or- The period covered is ____/____/____, through December 31, 2022.	Leaving Office: Date Left ____/____/____ <i>(Check one circle.)</i> The period covered is January 1, 2022, through the date of leaving office.
Assuming Office: Date assumed ____/____/____	-or- The period covered is ____/____/____, through the date of leaving office.
Candidate: Date of Election _____ and office sought, if different than Part 1: _____	

4. Schedule Summary (required)

► **Total number of pages including this cover page:** _____

Schedules attached

Schedule A-1 - <i>Investments</i> – schedule attached Schedule A-2 - <i>Investments</i> – schedule attached Schedule B - <i>Real Property</i> – schedule attached	Schedule C - <i>Income, Loans, & Business Positions</i> – schedule attached Schedule D - <i>Income – Gifts</i> – schedule attached Schedule E - <i>Income – Gifts – Travel Payments</i> – schedule attached
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-or-

None - *No reportable interests on any schedule*

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

DAYTIME TELEPHONE NUMBER () E-MAIL ADDRESS

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____ Signature _____
(month, day, year) (File the originally signed paper statement with your filing official.)

Instructions Cover Page

Enter your name, mailing address, and daytime telephone number in the spaces provided. **Because the Form 700 is a public document, you may list your business/office address instead of your home address.**

Part 1. Office, Agency, or Court

- Enter the name of the office sought or held, or the agency or court. Consultants must enter the public agency name rather than their private firm's name. (Examples: State Assembly; Board of Supervisors; Office of the Mayor; Department of Finance; Hope County Superior Court)
- Indicate the name of your division, board, or district, if applicable. (Examples: Division of Waste Management; Board of Accountancy; District 45). **Do not use acronyms.**
- Enter your position title. (Examples: Director; Chief Counsel; City Council Member; Staff Services Analyst)
- If you hold multiple positions (i.e., a city council member who also is a member of a county board or commission), you may be required to file statements with each agency. To simplify your filing obligations, you may complete an expanded statement.
- The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1. To file an expanded statement for multiple positions, enter the name of each agency with which you are required to file and your position title with each agency in the space provided. **Do not use acronyms.** Attach an additional sheet if necessary. Complete one statement disclosing all reportable interests for all jurisdictions. Then file the expanded statement with each agency as directed by Regulation 18723.1(c).

If you assume or leave a position after a filing deadline, you must complete a separate statement. For example, a city council member who assumes a position with a county special district after the April 1 annual filing deadline must file a separate assuming office statement. In subsequent years, the city council member may expand their annual filing to include both positions.

Example:

Brian Bourne is a city council member for the City of Lincoln and a board member for the Camp Far West Irrigation District – a multi-county agency that covers the Counties of Placer and Yuba. The City is located within Placer County. Brian may complete one expanded statement to disclose all reportable interests for both offices and list both positions on the Cover Page. Brian will file the expanded statement with each the City and the District as directed by Regulation 18723.1(c).

Part 2. Jurisdiction of Office

- Check the box indicating the jurisdiction of your agency and, if applicable, identify the jurisdiction. Judges, judicial candidates, and court commissioners have statewide jurisdiction. All other filers should review the Reference Pamphlet, page 13, to determine their jurisdiction.
- If your agency is a multi-county office, list each county in which your agency has jurisdiction.
- If your agency is not a state office, court, county office, city office, or multi-county office (e.g., school districts, special districts and JPAs), check the "other" box and enter the county or city in which the agency has jurisdiction.

Example:

This filer is a member of a water district board with jurisdiction in portions of Yuba and Sutter Counties.

1. Office, Agency, or Court	
Agency Name <small>(Do not use acronyms)</small> Feather River Irrigation District	
Division, Board, Department, District, if applicable N/A	Your Position Board Member
<input type="checkbox"/> If filing for multiple positions, list below or on an attachment. <small>(Do not use acronyms)</small>	
Agency: N/A	Position:
2. Jurisdiction of Office <small>(Check at least one box)</small>	
<input type="checkbox"/> State	<input type="checkbox"/> Judge or Court Commissioner <small>(Statewide Jurisdiction)</small>
<input checked="" type="checkbox"/> Multi-County Yuba & Sutter Counties	<input type="checkbox"/> County of _____
<input type="checkbox"/> City of _____	<input type="checkbox"/> Other _____

Part 3. Type of Statement

Check at least one box. The period covered by a statement is determined by the type of statement you are filing. If you are completing a 2022 annual statement, **do not** change the pre-printed dates to reflect 2023. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2023, through December 31, 2023, will be disclosed on your statement filed in 2024. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements may be combined. For example, if you leave office after January 1, but before the deadline for filing your annual statement, you may combine your annual and leaving office statements. File by the earliest deadline. Consult your filing officer or the FPPC.

Part 4. Schedule Summary

- Complete the Schedule Summary after you have reviewed each schedule to determine if you have reportable interests.
- Enter the total number of completed pages including the cover page and either check the box for each schedule you use to disclose interests; **or** if you have nothing to disclose on any schedule, check the "No reportable interests" box. Please **do not** attach any blank schedules.

Part 5. Verification

Complete the verification by signing the statement and entering the date signed. All statements must have a handwritten "wet" signature or "secure electronic signature," meaning either (1) a signature submitted using an approved electronic filing system or (2) if permitted by the filing officer, a digital signature submitted via the filer's agency email address. (See Regulations 18104 and 18757.) Companies such as Adobe and DocuSign offer digital signature services. **When you sign your statement, you are stating, under penalty of perjury, that it is true and correct.** Only the filer has authority to sign the statement. An unsigned statement is not considered filed and you may be subject to late filing penalties. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

SCHEDULE A-1 Investments

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.



▶ NAME OF BUSINESS ENTITY _____

GENERAL DESCRIPTION OF THIS BUSINESS _____

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY _____

GENERAL DESCRIPTION OF THIS BUSINESS _____

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY _____

GENERAL DESCRIPTION OF THIS BUSINESS _____

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY _____

GENERAL DESCRIPTION OF THIS BUSINESS _____

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY _____

GENERAL DESCRIPTION OF THIS BUSINESS _____

FAIR MARKET VALUE

\$2,000 - \$10,000	\$10,001 - \$100,000
\$100,001 - \$1,000,000	Over \$1,000,000

NATURE OF INVESTMENT

Stock Other _____ (Describe)

Partnership Income Received of \$0 - \$499
Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

____/____/22 ____/____/22
ACQUIRED DISPOSED

Filer's Verification

Print Name _____

Office, Agency or Court _____

Statement Type	2022/2023 Annual	Assuming	Leaving
	____ (yr) Annual	Candidate	

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____ (month, day, year)

Filer's Signature _____

Comments: _____

Instructions – Schedules A-1 and A-2 Investments

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. See Reference Pamphlet, page 13.

Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together have a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. See Reference Pamphlet, page 15, for more information on disclosing trusts.
- Business trusts

You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. See Reference Pamphlet, page 13, for detailed information. (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)
- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)

- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

Use Schedule A-1 to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. See second example below.

Use Schedule A-2 to report ownership of 10% or greater (e.g., a sole proprietorship).

To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 21 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

Frank Byrd holds a state agency position. His conflict of interest code requires full disclosure of investments. Frank must disclose his stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by his spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. She has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

Reminders

- Do you know your agency’s jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

Instructions – Schedule A-2

Investments, Income, and Assets of Business Entities/Trusts

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. See Reference Pamphlet, page 13. A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

To Complete Schedule A-2:

Part 1. Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check "Business Entity" and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

Part 2. Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

Part 3. Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting

period. See Reference Pamphlet, page 11, for examples. Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.

- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. See Reference Pamphlet, page 8, for an explanation of commission income.

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.

Part 4. Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.

- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.

SCHEDULE B

Interests in Real Property

(Including Rental Income)



▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS _____

CITY _____

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000		____/____/22	____/____/22
\$10,001 - \$100,000		ACQUIRED	DISPOSED
\$100,001 - \$1,000,000			
Over \$1,000,000			

NATURE OF INTEREST

Ownership/Deed of Trust	Easement
Leasehold _____	Other _____
Yrs. remaining	

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

\$0 - \$499	\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000	

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

None _____

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS _____

CITY _____

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:

\$2,000 - \$10,000		____/____/22	____/____/22
\$10,001 - \$100,000		ACQUIRED	DISPOSED
\$100,001 - \$1,000,000			
Over \$1,000,000			

NATURE OF INTEREST

Ownership/Deed of Trust	Easement
Leasehold _____	Other _____
Yrs. remaining	

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

\$0 - \$499	\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000	

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

None _____

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER* _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF LENDER _____

INTEREST RATE TERM (Months/Years)

_____% None _____

HIGHEST BALANCE DURING REPORTING PERIOD

\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000

Guarantor, if applicable _____

Filer's Verification

Print Name _____

Office, Agency or Court _____

Statement Type 2022/2023 Annual Assuming Leaving

____ Annual Candidate

(yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____

(month, day, year)

Filer's Signature _____

Comments: _____

Instructions – Schedule B Interests in Real Property

Report interests in real property located in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be “within the jurisdiction” of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. See Reference Pamphlet, page 13.

Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse’s or registered domestic partner’s interests in real property that are legally held separately by him or her

You are not required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16, for exceptions.)
 - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

To Complete Schedule B:

- Report the precise location (e.g., an assessor’s parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold,

Reminders

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

disclose the number of years remaining on the lease.

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the name of each tenant. Otherwise, mark “None.”
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender’s regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender’s business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

Example:

Allison Gande is a city planning commissioner. During the reporting period, she received rental income of \$12,000, from a single tenant who rented property she owned in the city’s jurisdiction. If Allison received \$6,000 each from two tenants, the tenants’ names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 4600 24th Street	
CITY Sacramento	
FAIR MARKET VALUE	IF APPLICABLE, LIST DATE
<input type="checkbox"/> \$2,000 - \$10,000	<input type="checkbox"/> / XX / XX
<input type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> ACQUIRED <input type="checkbox"/> DISPOSED
<input checked="" type="checkbox"/> \$100,001 - \$1,000,000	
<input type="checkbox"/> Over \$1,000,000	
NATURE OF INTEREST	
<input type="checkbox"/> Ownership/Deed of Trust	<input type="checkbox"/> Easement
<input type="checkbox"/> Leasehold	<input type="checkbox"/> Other
Yrs. remaining _____	
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	
<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$500 - \$1,000
<input type="checkbox"/> \$1,001 - \$100,000	<input type="checkbox"/> OVER \$100,000
<input checked="" type="checkbox"/> \$10,001 - \$100,000	
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.	
<input type="checkbox"/> None	
Henry Wells	
NAME OF LENDER*	
Sophia Petroillo	
ADDRESS (Business Address Acceptable)	
2121 Blue Sky Parkway, Sacramento	
BUSINESS ACTIVITY, IF ANY, OF LENDER	
Restaurant Owner	
INTEREST RATE	TERM (Months/Years)
8 % <input type="checkbox"/> None	15 Years
HIGHEST BALANCE DURING REPORTING PERIOD	
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> \$1,001 - \$10,000
<input checked="" type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> Guarantor, if applicable	
Comments: _____	

SCHEDULE C

Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)



▶ 1. INCOME RECEIVED		▶ 1. INCOME RECEIVED	
NAME OF SOURCE OF INCOME		NAME OF SOURCE OF INCOME	
ADDRESS <i>(Business Address Acceptable)</i>		ADDRESS <i>(Business Address Acceptable)</i>	
BUSINESS ACTIVITY, IF ANY, OF SOURCE		BUSINESS ACTIVITY, IF ANY, OF SOURCE	
YOUR BUSINESS POSITION		YOUR BUSINESS POSITION	
GROSS INCOME RECEIVED	No Income - Business Position Only	GROSS INCOME RECEIVED	No Income - Business Position Only
\$500 - \$1,000	\$1,001 - \$10,000	\$500 - \$1,000	\$1,001 - \$10,000
\$10,001 - \$100,000	OVER \$100,000	\$10,001 - \$100,000	OVER \$100,000
CONSIDERATION FOR WHICH INCOME WAS RECEIVED		CONSIDERATION FOR WHICH INCOME WAS RECEIVED	
Salary	Spouse's or registered domestic partner's income <i>(For self-employed use Schedule A-2.)</i>	Salary	Spouse's or registered domestic partner's income <i>(For self-employed use Schedule A-2.)</i>
Partnership <i>(Less than 10% ownership. For 10% or greater use Schedule A-2.)</i>		Partnership <i>(Less than 10% ownership. For 10% or greater use Schedule A-2.)</i>	
Sale of _____ <i>(Real property, car, boat, etc.)</i>		Sale of _____ <i>(Real property, car, boat, etc.)</i>	
Loan repayment		Loan repayment	
Commission or Rental Income, <i>list each source of \$10,000 or more</i>		Commission or Rental Income, <i>list each source of \$10,000 or more</i>	
_____ <i>(Describe)</i>		_____ <i>(Describe)</i>	
Other _____ <i>(Describe)</i>		Other _____ <i>(Describe)</i>	

Comments: _____

▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*	INTEREST RATE	TERM (Months/Years)
_____	_____ % None	_____
ADDRESS <i>(Business Address Acceptable)</i>		
BUSINESS ACTIVITY, IF ANY, OF LENDER		
HIGHEST BALANCE DURING REPORTING PERIOD		
\$500 - \$1,000		
\$1,001 - \$10,000		
\$10,001 - \$100,000		
OVER \$100,000		
SECURITY FOR LOAN		
None Personal residence		
Real Property _____ <i>Street address</i>		
_____ <i>City</i>		
Guarantor _____		
Other _____ <i>(Describe)</i>		

Filer's Verification

Print Name _____ Office, Agency or Court _____

Statement Type 2022/2023 Annual _____ Annual Assuming Leaving Candidate
(yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____ Filer's Signature _____
(month, day, year)

Instructions – Schedule C

Income, Loans, & Business Positions

(Income Other Than Gifts and Travel Payments)

Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. See Reference Pamphlet, page 11. You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. See Reference Pamphlet, page 13, for more information about doing business in the jurisdiction. Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

Reporting Business Positions:

You must report your job title with each reportable business entity even if you received no income during the reporting period. Use the comments section to indicate that no income was received.

Commonly reportable income and loans include:

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10, concerning your ability to receive future honoraria.)
- Incentive compensation (See Reference Pamphlet, page 12.)

Reminders

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

You are not required to report:

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

See Reference Pamphlet, page 11, for more exceptions to income reporting.

To Complete Schedule C:

Part 1. Income Received/Business Position Disclosure

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. See Reference Pamphlet, page 8. **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

Part 2. Loans Received or Outstanding During the Reporting Period

- Provide the name and address of the lender.
- Provide a general description of the business activity if the lender is a business entity.
- Check the box indicating the highest balance of the loan during the reporting period.
- Disclose the interest rate and the term of the loan.
 - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period.
 - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
- Identify the security, if any, for the loan.

SCHEDULE D

Income – Gifts



▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

Filer's Verification

Print Name _____

Office, Agency or Court _____

Statement Type 2022/2023 Annual Assuming Leaving
 _____ Annual Candidate

(yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____
(month, day, year)

Filer's Signature _____

Comments: _____

Instructions – Schedule D Income – Gifts

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is unknown, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary. You may indicate an intermediary either in the "source" field after the name or in the "comments" section at the bottom of Schedule D.

Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10, regarding your ability to receive future honoraria.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

Reminders

- Gifts from a single source are subject to a \$520 limit in 2022. See Reference Pamphlet, page 10.
- Code filers – you only need to report gifts from reportable sources.

Gift Tracking Mobile Application

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

You are not required to disclose:

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (See Regulation 18942 for a complete list.). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist registered to lobby your state agency, on holidays, birthdays, or similar occasions
- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars)
- A monetary bequest or inheritance (However, inherited investments or real property may be reportable on other schedules.)
- Personalized plaques or trophies with an individual value of less than \$250
- Campaign contributions
- Up to two tickets, for your own use, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket must be received from the organization or committee holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established relationship with the family member and there is no evidence to suggest the donor had a purpose to influence you. (See Regulation 18943.)
- Free admission, food, and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not a lobbyist registered to lobby the official's state agency, where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.

To Complete Schedule D:

- Disclose the full name (not an acronym), address, and, if a business entity, the business activity of the source.
- Provide the date (month, day, and year) of receipt, and disclose the fair market value and description of the gift.



SCHEDULE E Income – Gifts Travel Payments, Advances, and Reimbursements

- Mark either the gift or income box.
- Mark the “501(c)(3)” box for a travel payment received from a nonprofit 501(c)(3) organization or the “Speech” box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: Gift **-or-** Income

 Made a Speech/Participated in a Panel

 Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: Gift **-or-** Income

 Made a Speech/Participated in a Panel

 Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): ___/___/___ - ___/___/___ AMT: \$ _____
(If gift)

▶ MUST CHECK ONE: Gift **-or-** Income

 Made a Speech/Participated in a Panel

 Other - Provide Description _____

▶ If Gift, Provide Travel Destination _____

Filer's Verification

Print Name _____

Office, Agency
or Court _____

Statement Type	2022/2023 Annual	Assuming	Leaving
	_____/_____/_____ <i>(yr)</i> Annual	Candidate	

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed _____
(month, day, year)

Filer's Signature _____

Comments: _____

Instructions – Schedule E Travel Payments, Advances, and Reimbursements

Travel payments reportable on Schedule E include advances and reimbursements for travel and related expenses, including lodging and meals.

Gifts of travel may be subject to the gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. See the FPPC fact sheet entitled "Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans" to read about travel payments under section 89506(a).

You are **not** required to disclose:

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a non-profit entity exempt from taxation under Internal Revenue Code Section 501(c)(3) for which you provided equal or greater consideration, such as reimbursement for travel on business for a 501(c)(3) organization for which you are a board member.

Note: Certain travel payments may not be reportable if reported via email on Form 801 by your agency.

To Complete Schedule E:

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
 - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$50 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift and the **date(s)** received. If the travel occurred on or after January 1, 2017, you must also disclose the **travel destination**

- **Travel payments are income** if you provided services that were equal to or greater in value than the payments received. You must disclose income totaling \$500 or more from a single source during the period

covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

Example:

City council member MaryClaire Chandler is the chair of a 501 (c)(6) trade association, and the association pays for her travel to attend its meetings. Because MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which she is not providing services are likely considered gifts. Note that the same payment from a 501(c)(3) would NOT be reportable.

▶ NAME OF SOURCE (Not an Acronym)	
Health Services Trade Association	
ADDRESS (Business Address Acceptable)	
1230 K Street, Suite 610	
CITY AND STATE	
Sacramento, CA	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Association of Healthcare Workers	
DATE(S):	AMT: \$ 550.00
(if gift)	
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input checked="" type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for board meeting.</u>	
▶ If Gift, Provide Travel Destination _____	

Example:

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as his meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose. Thus, Mayor Kim must report the gift of travel, but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at www.fppc.ca.gov.)

▶ NAME OF SOURCE (Not an Acronym)	
Chengdu Municipal People's Government	
ADDRESS (Business Address Acceptable)	
2 Caoshi St, CaoShiJie, Qingyang Qu, Chengdu Shi,	
CITY AND STATE	
Sichuan Sheng, China, 610000	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
DATE(S):	AMT: \$ 3,874.38
(if gift)	
▶ MUST CHECK ONE: <input checked="" type="checkbox"/> Gift -or- <input type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for trip to China.</u>	
▶ If Gift, Provide Travel Destination <u>Sichuan Sheng, China</u>	