



## Community School for Creative Education

### CSCE Board Retreat

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#### Date and Time

Saturday February 24, 2024 at 9:00 AM PST

#### Location

CSCE  
2111 International Blvd.  
Oakland, CA 94606

#### Join Zoom Meeting

<https://us06web.zoom.us/j/83722223466?pwd=9bKfNMryRKRCbELWXw3X0nK6wURiBu.1>

Meeting ID: 837 2222 3466

Passcode: CSCE2111

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#### **Rudolf Steiner, Motto of Social Ethics, 1920 (at end of first full year of first Waldorf School founded 1919)**

The healing social life is found when in the mirror of each human being the whole community finds its reflection, and when in the community the strength of each one is living.

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## 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. Allegra Alessandri
2. Anastasia Prentiss
3. Martha Candido
4. Jennifer Pellegrine
5. William Kopenhagen

## Agenda

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>9:00 AM</b>
<b>A.</b> Record Attendance		Anastasia Prentiss	2 m
<b>B.</b> Call the Meeting to Order		Anastasia Prentiss	2 m
<b>C.</b> Agenda Approval	Vote	Anastasia Prentiss	3 m
<b>D.</b> Public Comment	Discuss	Anastasia Prentiss	5 m
<b>II. Consent Agenda</b>			<b>9:12 AM</b>

	Purpose	Presenter	Time
<b>A.</b> Approve Minutes - Wednesday, January 10th - Regular Board Meeting	Approve Minutes	Anastasia Prentiss	2 m
<b>B.</b> January Check Register	Vote	Anastasia Prentiss	2 m
<b>III. Board Retreat</b>			<b>9:16 AM</b>
<b>A.</b> CSCE Board Retreat - Intro	Discuss	Taima Beyah	40 m
<b>B.</b> CSCE Board Retreat - Board Roles & Responsibilities	Discuss	Taima Beyah	30 m
<b>C.</b> Break			15 m
<b>D.</b> CSCE Board Retreat - Priorities	Discuss	Taima Beyah	110 m
<b>E.</b> Lunch Set Up			15 m
<b>F.</b> CSCE Board Retreat - Action Plan	Discuss	Taima Beyah	60 m
<b>G.</b> CSCE Board Retreat - Closing	Discuss	Taima Beyah	15 m
<b>IV. Academic Excellence</b>			<b>2:01 PM</b>
<b>A.</b> Head of School Report	FYI	Phillip Gedeon	15 m
<b>B.</b> G1 Funding Application Presentation 24-25	FYI	Phillip Gedeon	10 m
<b>C.</b> 22-23 SARC Approval	Vote	Phillip Gedeon	10 m
<b>D.</b> ProCare Therapy Contract Approval	Vote	Kimberly Palmore	5 m
<b>E.</b> LCAP Mid-Year Progress Report	Vote	Kimberly Palmore	10 m
<b>F.</b> Head of School Mid-year Staff Survey Results	FYI	Phillip Gedeon	15 m
<b>V. Development</b>			<b>3:06 PM</b>
<b>A.</b> Fundraising Update & Community Benefit 2024	FYI	Kimberly Palmore	10 m
<b>VI. Finance</b>			<b>3:16 PM</b>
<b>A.</b> Multiyear Budget Projection Presentation & Vote	Vote	Kimberly Palmore	45 m

	Purpose	Presenter	Time
<b>VII. Governance</b>			<b>4:01 PM</b>
<b>A.</b> Form 700 Reminder	FYI	Kimberly Palmore	5 m
<b>B.</b> Comprehensive Safety Plan Update	Vote	Kimberly Palmore	10 m
<b>C.</b> Facility Update	FYI	Phillip Gedeon	10 m
<b>VIII. Other Business</b>			<b>4:26 PM</b>
<b>A.</b> Next CSCE Board Meeting - Wednesday, March 13, 2024	FYI	Anastasia Prentiss	2 m
<b>IX. Closing Items</b>			<b>4:28 PM</b>
<b>A.</b> Adjourn Meeting	Vote	Anastasia Prentiss	1 m

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REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY Pursuant to the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990, any individual with a disability who requires reasonable accommodation to attend or participate in this meeting of the Governing Board may request assistance by contacting Community School for Creative Education, 2111 International Boulevard, Oakland CA 94606 510 686 4131.

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# Coversheet

## Approve Minutes - Wednesday, January 10th - Regular Board Meeting

**Section:** II. Consent Agenda  
**Item:** A. Approve Minutes - Wednesday, January 10th - Regular Board Meeting  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for CSCE Regular Board Meeting on January 10, 2024

APPROVED



## Community School for Creative Education

### Minutes

#### CSCE Regular Board Meeting

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##### **Date and Time**

Wednesday January 10, 2024 at 6:00 PM

##### **Location**

CSCE

2111 International Blvd.

Oakland, CA 94606

Join Zoom Meeting

<https://us06web.zoom.us/j/83070909461?pwd=TGAfeasX5AWCX6zEHGctQYFI3TUrWY.1>

Meeting ID: 830 7090 9461

Passcode: CSCE2111

Martha Candido

22241 S Garden Ave Apt. 4, Hayward CA 94541

Dr. Allegra Alessandri Pfiefer

1430 N St., Sacramento CA 95814

William Kappenhagen

952 Sutter Street, SF, CA 94109

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## **Objective and 5 BIG GOALS**

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## **BOARD MEMBERS**

1. Allegra Alessandri
2. Anastasia Prentiss
3. Martha Candido
4. Jennifer Pellegrine
5. William Kappenhagen

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### **Directors Present**

A. Alessandri (remote), A. Prentiss, B. Kappenhagen (remote), J. Pellegrine

### **Directors Absent**

M. Candido

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## Guests Present

K. Palmore (remote), P. Gedeon (remote)

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## 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 10, 2024 at 6:11 PM.

### C. Agenda Approval

J. Pellegrine made a motion to approve the agenda for the January 10th board meeting.

B. Kopenhagen seconded the motion.

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

#### Roll Call

B. Kopenhagen Aye

J. Pellegrine Aye

A. Prentiss Aye

M. Candido Absent

A. Alessandri Aye

### D. Public Comment

There was no public comment.

## II. Consent Agenda

### A. Approve Minutes - Wednesday, December 13th - Regular Board Meeting

J. Pellegrine made a motion to approve the minutes from CSCE Regular Board Meeting on 12-13-23.

A. Alessandri seconded the motion.

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

#### Roll Call

A. Prentiss Aye

B. Kopenhagen Aye

A. Alessandri Aye

J. Pellegrine Aye

M. Candido Absent

### B. December Check Register

J. Pellegrine made a motion to approve the December check register.

A. Alessandri seconded the motion.

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

**Roll Call**

A. Prentiss	Aye
M. Candido	Absent
B. Kopenhagen	Aye
A. Alessandri	Aye
J. Pellegrine	Aye

**III. Academic Excellence**

**A. Head of School Report**

A report by the Head of School was given covering current and upcoming events at CSCE. Topics included field trips, spirit week, the winter spiral celebration, and the festival of peace and hope.

**B. Academic Calendar 2024-25**

J. Pellegrine made a motion to approve the tentative academic calendar for the 24-25 school year with the correction of the January 2nd to 3rd date.

A. Alessandri seconded the motion.

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

**Roll Call**

A. Prentiss	Aye
A. Alessandri	Aye
J. Pellegrine	Aye
B. Kopenhagen	Aye
M. Candido	Absent

**C. CSCE 2024-25 Instructional Minutes**

A. Alessandri made a motion to approve the instructional minutes for the 24-25 school year.

J. Pellegrine seconded the motion.

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

**Roll Call**

A. Alessandri	Aye
A. Prentiss	Aye
B. Kopenhagen	Aye
J. Pellegrine	Aye
M. Candido	Absent

**IV. Development**

**A.**

## Fundraising Update

A fundraising update was given by the Development Manager.

## V. Governance

### A. In-Lieu Facilities Use Agreement 2024-2027

B. Kopenhagen made a motion to approve leadership the ability to move forward with the FUA after the square footage is confirmed on the agreement.

A. Alessandri seconded the motion.

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

#### Roll Call

M. Candido	Absent
B. Kopenhagen	Aye
A. Alessandri	Aye
A. Prentiss	Aye
J. Pellegrine	Aye

### B. Approval of Head of School Bonus

J. Pellegrine made a motion to approve a bonus for the HOS.

B. Kopenhagen seconded the motion.

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

#### Roll Call

A. Alessandri	Aye
M. Candido	Absent
B. Kopenhagen	Aye
J. Pellegrine	Aye
A. Prentiss	Abstain

### C. Approval of Director of Finance & Operations Bonus

J. Pellegrine made a motion to approve a bonus for the Director of Finance & Operations.

B. Kopenhagen seconded the motion.

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

#### Roll Call

B. Kopenhagen	Aye
A. Alessandri	Aye
J. Pellegrine	Aye
A. Prentiss	Abstain
M. Candido	Absent

### D. 2023-24 Leadership Evaluation

Dr. Prentiss led a discussion on the process of upcoming leadership evaluations. Dr. Pellegine and Dr. Alessandri will be leading the evaluation process.

## VI. Closed Session Item

### A. Public Employment (§ 54957) Title: Head of School

Closed session was held to discuss the HOS leadership position.

## VII. Open Session Report Out Item

### A. Closed Session Report Out

There was no action taken in closed session.

## VIII. Other Business

### A. Board Retreat Spring 2023 - Set the Date

J. Pellegrine made a motion to hold the spring retreat on February 24th. Location to be determined.

A. Alessandri seconded the motion.

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

#### Roll Call

A. Alessandri Aye

J. Pellegrine Aye

A. Prentiss Aye

B. Kopenhagen Absent

M. Candido Absent

### B. Next CSCE Board Meeting - Wednesday, February 14, 2024

A reminder was given that our next board meeting is on Wednesday, Feb. 14th.

## IX. 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 8:32 PM.

Respectfully Submitted,

A. Prentiss

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# Coversheet

## January Check Register

**Section:** II. Consent Agenda  
**Item:** B. January Check Register  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** CSCE Check Register January 2024.pdf

Location: CA135--Community School for Creative-CSC

## Community School for Creative-CSC Check Register January 2024

Date	Vendor	Document no.	Amount
<b>Bank: Beneficial Bank Oper - Beneficial State Bank</b>		<b>Account no: 820016559</b>	
<b>01/25/2024</b>			
01/25/2024	V007589--Bay Area Transport Services	40001116	1,750.00
01/25/2024	V003242--CINTAS CORPORATION - 29059	40001117	243.12
01/25/2024	V008881--First-Citizens Bank & Trust Co	40001118	1,245.85
01/25/2024	V014911--Katherine Au, LMFT	40001119	480.00
01/25/2024	V014331--MetLife Small Business Center	40001120	930.16
01/25/2024	V010299--OUSD Buildings & Grounds	40001121	250.00
01/25/2024	V003459--Payroll	10781	300.00
01/25/2024	V003459--Payroll	10780	1,636.03
01/25/2024	V016771--SchoolSeed Foundation	40001123	19,303.00
01/25/2024	V011341--The Education Team	40001122	879.01
<b>Total for 01/25/2024</b>			<b>27,017.17</b>
<b>01/18/2024</b>			
01/18/2024	V003798--Amazon Capital Services	40001111	488.38
01/18/2024	V000003--Charter School Management Corporation	40001112	7,083.33
01/18/2024	V000032--CharterSAFE	40001113	5,213.00
01/18/2024	V003242--CINTAS CORPORATION - 29059	40001114	528.79
01/18/2024	V011235--Swing Education Inc	40001115	1,490.00
<b>Total for 01/18/2024</b>			<b>14,803.50</b>
<b>01/16/2024</b>			
01/16/2024	V007350--Alameda County Office of Education	40001108	37,137.22
01/16/2024	V016628--Briana Amr	40001109	600.00
01/16/2024	V016629--Mia Palmore	40001110	725.00
<b>Total for 01/16/2024</b>			<b>38,462.22</b>
<b>01/11/2024</b>			
01/11/2024	V007377--Alliance for Public Waldorf Education	40001096	1,000.00
01/11/2024	V003798--Amazon Capital Services	40001097	4,121.65
01/11/2024	V007533--Attitudinal Healing Connection, Inc.	40001098	14,931.48
01/11/2024	V014309--Grace Pang	40001099	2,926.00
01/11/2024	V014309--Grace Pang	Voided - 40001063	(2,926.00)
01/11/2024	V009707--Lionbridge Technologies Inc	40001100	250.00
01/11/2024	V014250--Norton and Associates, Inc.	40001101	3,015.02
01/11/2024	V014915--Regina Zarate-Mendiola	40001102	363.00
01/11/2024	V003336--Revolution Foods, PBC.	40001103	8,567.45
01/11/2024	V016496--Silvia Guzman	40001104	990.00
01/11/2024	V011059--Sonitrol	40001105	1,362.69
01/11/2024	V011235--Swing Education Inc	40001106	2,018.95
01/11/2024	V000012--Young, Minney & Corr, LLP	40001107	1,355.00
<b>Total for 01/11/2024</b>			<b>37,975.24</b>
<b>01/10/2024</b>			
01/10/2024	V003459--Payroll	10779	300.00
01/10/2024	V003459--Payroll	10778	265.61
<b>Total for 01/10/2024</b>			<b>565.61</b>
<b>01/04/2024</b>			
01/04/2024	V007350--Alameda County Office of Education	40001082	354.00

Location: CA135--Community School for Creative-CSC

## Community School for Creative-CSC Check Register January 2024

Date	Vendor	Document no.	Amount
01/04/2024	V007759--Blaisdell's Business Products	40001083	1,366.88
01/04/2024	V000031--Charter Schools Development Center	40001084	558.00
01/04/2024	V000032--CharterSAFE	40001085	470.16
01/04/2024	V003242--CINTAS CORPORATION - 29059	40001086	446.55
01/04/2024	V012794--Clark Pest Control of Stockton Inc.	40001087	350.00
01/04/2024	V014475--First-Citizens Bank & Trust Company	40001088	1,245.85
01/04/2024	V014513--Kathryn Keslosky	40001089	412.50
01/04/2024	V010175--Norcal Cleaning Services	40001090	10,845.00
01/04/2024	V011235--Swing Education Inc	40001091	3,970.85
01/04/2024	V000097--T-Mobile - 742596	40001092	1,034.35
01/04/2024	V011341--The Education Team	40001093	4,988.38
01/04/2024	V000018--Wilkinson Hadley King & Co. LLP	40001094	1,900.00
01/04/2024	V011870--Xobee Networks Inc	40001095	108.00
	<b>Total for 01/04/2024</b>		<b><u>28,050.52</u></b>
	<b>Total for Beneficial Bank Oper</b>		<b><u><u>146,874.26</u></u></b>

# Coversheet

## G1 Funding Application Presentation 24-25

**Section:** IV. Academic Excellence  
**Item:** B. G1 Funding Application Presentation 24-25  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:**  
Community School for Creative Education 2024-2025 Measure G1 Application.pdf



## 2024-2025 Measure G1 Application

**Due: March 14, 2024**

*Allocations are provisional subject to Board approval*

### School Information & Student Data

<b>School</b>	Community School for Creative Education	<b>School Address</b>	2111 International Blvd. Oakland, CA 94606
<b>Contact</b>	Phillip Gedeon	<b>Contact Email</b>	phillipg@communityschoolforcreativeeducation.org
<b>Principal</b>	Phillip Gedeon	<b>Principal Email</b>	phillipg@communityschoolforcreativeeducation.org
<b>School Phone</b>	510-686-4131	<b>Total Number of Students</b>	69
<b>Recommended Grant Amount<sup>1</sup></b>	<b>\$29,736</b>	<b>2022-23 CALPADS<sup>2</sup> Enrollment Figure (grades 6-8 Oakland residents only)</b>	34
		<b>2023-24 LCFF<sup>3</sup> Enrollment</b>	63

Student Demographics (%)				Measure G1 Team	
English Learners	49.5%	Asian/Pacific Islander	10.9%	<b>Name</b>	<b>Position</b>
LCFF	91%	Latinx	60.4%	Phillip Gedeon	Head of School
SPED	19.3%	Black or African-American	16.8%	Kimberly Palmore	Director of Finance and Operations
		White	1.5%	Ana Barraza	Assistant Head of School
		Indigenous or Native	0.5%		

<sup>1</sup> Allocation of funds will be based on the prior year 20-day count for 6-8 enrollment multiplied by the LCFF % and total funds collected from tax revenue.

<sup>2</sup> The California Longitudinal Pupil Achievement Data System (CALPADS) collects various about students, including school enrollment. Each fall, around early October, all schools in California submit enrollment figures into the CALPADS system which becomes the official count for that school for that year.

<sup>3</sup> Under the Local Control Funding Formula, the following categories of students receive additional funding: English learners, students in foster care, students eligible for the free- and reduced-lunch program.

		American			
		Multiracial	5		

<b>Chronic Absence (Include raw number and percent)</b>				
	2021-22	2022-23	2023-24	2024-25 Goal
	raw number (%)	raw number (%)	raw number (%)	raw number (%)
Student Population Overall	59.41%	62.1%	50%	
Asian/Pacific Islander	5.45%	26.1%	16%	
Latinx	38.61%	64.8%	54%	
Black or African-American	12.38%	78.1%	68%	
White	2.48%	0	0	
Indigenous or Native American		0	0	
English Learners	27.72%	57.3%	47%	
Students w/ IEPs	23%	66.7%	56%	
Free/ Reduced Lunch Students	89%	64%	54%	

## Metrics

(all data points are required)

<b>Electives (Include raw number and percent)</b>					
Metric	Area	2021-22	2022-23	2023-24	2024-25 Goal
		raw number (%)	raw number (%)	raw number (%)	raw number (%)
Number of students taking elective courses.	Art	85 (100%)	61 (100%)	69 (100%)	69 (100%)
	Language	85 (100%)	61 (100%)	69 (100%)	69 (100%)
	Music	85 (100%)	N/A	N/A	N/A
Number of students participating in non-course	Art	85 (100%)	61 (100%)	69 (100%)	69 (100%)
	Language	N/A	N/A	N/A	N/A

experiences (e.g. after-school program)	Music	N/A	N/A	N/A	N/A
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**Positive & Safe Culture  
(Include raw number and percent)**

Metric	2021-22 (%)	2022-23 (%)	2023-24 (%)	2024-25 Goal (%)
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**Average Daily Attendance  
Date of Figure:**

Asian/Pacific Islander	3.72 (93%)	2.67 (89%)	4.85 (97%)	4.85 (97%)
Latinx	39.01 (83%)	38.87 (90%)	38.25 (89%)	38.25 (89%)
Black or African-American	5.68 (68%)	3.89 (78%)	6.18 (82%)	6.18 (82%)
White	1.75 (88%)	3.78 (94%)	1.91 (96%)	1.91 (96%)
Indigenous or Native American	0 (0%)	0 (0%)	2.43 (79%)	2.43 (79%)
English Learners	21.23 (84%)	18.38 (88%)	28.71 (91%)	28.71 (91%)
Students w/ IEPs	15.27 (80%)	10.78 (87%)	11.9 (92%)	11.9 (92%)
Free/ Reduced Lunch	43.46 (81%)	34.32 (91%)	47.39 (89%)	47.39 (89%)

Metric	2021-22 raw number (%)	2022-23 raw number (%)	2023-24 raw number (%)	2024-25 Goal raw number (%)
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**Suspended Students  
Date of Figure:**

Asian/Pacific Islander	0	2	0	0
Latinx	1	4	1	0
Black or African-American	0	2	2	0
White	2	1	0	0
Indigenous or Native American	0	0	0	0
English Learners	0	0	1	0
Students w/ IEPs	1	3	2	0

Free/ Reduced Lunch	1	8	3	0
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Student Retention from 5th Grade to 6th Grade				
Metric	2021-22	2022-23	2023-24	2024-25 Goal
6th Grade Enrollment	21/26 (80%)	16/26 (61%)	16/31 (52%)	12/16 (75%)

## Community and Staff Engagement

Community Engagement Meeting(s)	
Community Group	Date
Parent Meeting	Wednesday, Feb 28, 2024
CSCE Board Meeting	Saturday, February 24, 2024

Staff Engagement Meeting(s)	
Staff Group	Date
Staff Meeting	Wednesday, February 7, 2024

<u><a href="#">Music (Rubric)</a></u>	2022-23	2023-24
<b>Access and Equitable Opportunity</b>	N/A	N/A
<b>Instructional Program</b>	N/A	N/A
<b>Staffing</b>	N/A	N/A
<b>Facilities</b>	N/A	N/A
<b>Equipment and Materials</b>	N/A	N/A
<b>Teacher Professional Learning</b>	N/A	N/A
<u><a href="#">World Language (Rubric)</a></u>	2022-23	2023-24



<b>Content and Course Offerings</b>	N/A	Developing
<b>Communication</b>	N/A	Emerging
<b>Real world learning and Global competence</b>	N/A	Developing
<b><u>Art (Visual Arts, Theater, and Dance)</u></b>	<b>2022-23</b>	<b>2023-24</b>
<b>Access and Equitable Opportunity</b>	N/A	Quality
<b>Instructional Program</b>	N/A	Quality
<b>Staffing</b>	N/A	Quality
<b>Facilities</b>	N/A	Basic
<b>Equipment and Materials</b>	N/A	Basic
<b>Teacher Professional Learning</b>	N/A	Basic

## Proposed Expenditures

### Guidelines

1. In the following sections, please discuss your team's plan to address the goals of G1:
  - a. Increase access to courses in arts, music, and world languages in grades 6-8.
  - b. Improve student retention during the transition from elementary to middle school.
  - c. Create a more positive and safe middle school learning environment.
2. Please explain how you plan to use the Measure G1 funds to meet the goals, as measured in the METRICS section of this proposal.
3. Add additional lines as needed.
4. The total of all items should equal the amount listed in "Recommended Grant Amount" on page 1
5. Expenditures must supplement, not supplant expenditures made from other funding sources. In other words, Measure G1 funds must be used for new expenditures, expenditures already funded from Measure G1, expenditures previously paid for by a funding source that has ended, or to pay for an expenditure that would have been cut, were it not for Measure G1 funds.

## Summary of 2023-24 Approved Expenditures

All Actual Expenditures		Budget Amount
<b>Safe &amp; Positive Culture</b>		
1	Fund trauma-sensitive Therapeutic Movement & Visual Art Teacher to support Middle School Students at \$35/hr at 40 h/week for 14.5 weeks delivered 3 trimester blocks	\$20,300

	over the academic year	
2	Fund socio-emotional support staff to focus on middle school student culture support	\$10,732.94
<b>Electives (Art, Music, World Language)</b>		
1	Fund Spanish World Language Teacher at \$32/h for 34 weeks, 4 hours per week	\$4,352
<b>Budget Total</b>		<b>\$35,384.94</b>

## Summary of 2024-25 Proposed Expenditures

All Proposed Expenditures (from sections below)		Budget Amount
1	Fund trauma-sensitive Therapeutic Movement & Visual Art Teacher to support Middle School Students at \$35/hr at 40 h/week for 14.5 weeks delivered 3 trimester blocks	\$20,300
2	Fund Spanish World Language Teacher at \$32/h for 34 weeks, 4 hours per week	\$4,352
3	Fund socio-emotional support staff to focus on middle school student culture support	\$5,084
4		
5		
6		
7		
<b>Budget Total (must add up to Recommended Grant Amount)</b>		<b>\$29,736</b>

## Proposed Expenditures By Focus Area

Proposed Expenditures for Electives (Art, Language, and Music only)			
Description of Proposed Expenditures	Number of students taking a course in art, language, or music (based on the specific investment).	Number of students participating in a non-course experience in art, language or music (based on the specific investment) + frequency and amount of time spent in each	Budget Amount

		activity.	
Fund Spanish World Language Teacher	60	60	\$4,352

Proposed Expenditures for Positive & Safe Culture		
Description of Proposed Expenditures	Which metric will this investment impact - suspensions or average daily attendance?	Budget Amount
Fund socio-emotional support staff to focus on middle school student culture support	Average daily attendance / Suspension Rate	\$5,084
Fund trauma-sensitive Therapeutic Movement & Visual Art Teacher	Average daily attendance	\$20,300

Proposed Expenditures for Retention of 6th Graders	
Description of Proposed Expenditures	Budget Amount

**Please submit your Measure G1 proposal to Cliff Hong ([clifford.hong@ousd.org](mailto:clifford.hong@ousd.org)) and Karen Lozano ([karen.lozano@ousd.org](mailto:karen.lozano@ousd.org)).**

# Coversheet

## 22-23 SARC Approval

**Section:** IV. Academic Excellence  
**Item:** C. 22-23 SARC Approval  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 2022 - 2023 School Accountability Report Card.pdf

# Community School for Creative Education

## 2022–23 School Accountability Report Card

### Reported Using Data from the 2022–23 School Year

#### California Department of Education

**Address:** 2111 International Blvd.  
Oakland, CA , 94606-4903

**Principal:** Mr. Phillip Gedeon, Head of  
School

**Phone:** (510) 994-6309

**Grade Span:** K-8

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.

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## About This School

### Mr. Phillip Gedeon, Head of School

📍 Principal, Community School for Creative Education

### About Our School

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### Contact

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Community School for Creative Education  
2111 International Blvd.  
Oakland, CA 94606-4903

Phone: [\(510\) 994-6309](tel:5109946309)

Email: [phillipg@communityschoolforcreativeeducation.org](mailto:phillipg@communityschoolforcreativeeducation.org)

## Contact Information (School Year 2023–24)

### District Contact Information (School Year 2023–24)

<b>District Name</b>	Alameda County Office of Education
<b>Phone Number</b>	(510) 887-0152
<b>Superintendent</b>	Castro, Alysse
<b>Email Address</b>	<a href="mailto:superintendent@acoe.org">superintendent@acoe.org</a>
<b>Website</b>	<a href="http://www.acoe.org">www.acoe.org</a>

### School Contact Information (School Year 2023–24)

<b>School Name</b>	Community School for Creative Education
<b>Street</b>	2111 International Blvd.
<b>City, State, Zip</b>	Oakland, CA , 94606-4903
<b>Phone Number</b>	(510) 994-6309
<b>Principal</b>	Mr. Phillip Gedeon, Head of School
<b>Email Address</b>	<a href="mailto:phillipg@communityschoolforcreativeeducation.org">phillipg@communityschoolforcreativeeducation.org</a>
<b>Website</b>	<a href="http://www.communityschoolforcreativeeducation.org">www.communityschoolforcreativeeducation.org</a>
<b>County-District-School (CDS) Code</b>	01100170123968

*Last updated: 11/26/23*

## School Description and Mission Statement (School Year 2023–24)

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, well-rounded, 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, well-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

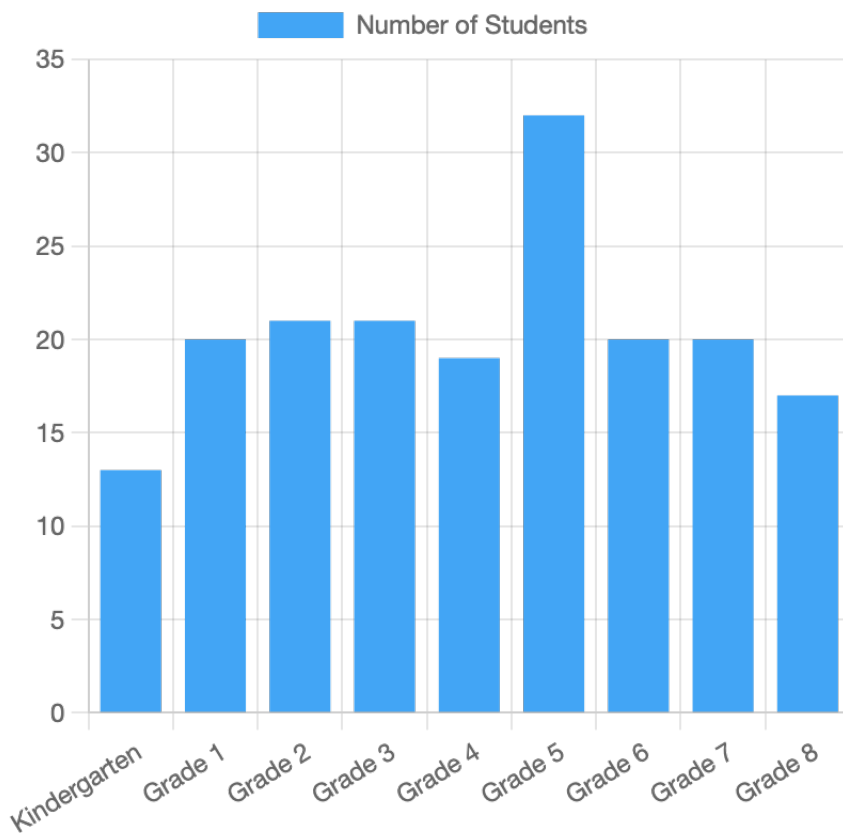
- by end of fifth grade , a fluency rate of 140 words per minutes (see Renewal, pp. 27-28)

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: 11/26/23*

## Student Enrollment by Grade Level (School Year 2022–23)

Grade Level	Number of Students
Kindergarten	13
Grade 1	20
Grade 2	21
Grade 3	21
Grade 4	19
Grade 5	32
Grade 6	20
Grade 7	20
Grade 8	17
Total Enrollment	183



Last updated: 11/26/23

**Student Enrollment by Student Group (School Year 2022–23)**

<b>Student Group</b>	<b>Percent of Total Enrollment</b>
Female	49.70%
Male	50.30%
Non-Binary	0.00%
American Indian or Alaska Native	1.10%
Asian	9.80%
Black or African American	10.90%
Filipino	1.10%
Hispanic or Latino	57.90%
Native Hawaiian or Pacific Islander	2.20%
Two or More Races	4.90%
White	3.80%

<b>Student Group (Other)</b>	<b>Percent of Total Enrollment</b>
English Learners	50.80%
Foster Youth	0.00%
Homeless	0.50%
Migrant	0.00%
Socioeconomically Disadvantaged	79.20%
Students with Disabilities	17.50%

**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)**

<b>Authorization/Assignment</b>	<b>School Number</b>	<b>School Percent</b>	<b>District Number</b>	<b>District Percent</b>	<b>State Number</b>	<b>State Percent</b>
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/Incomplete/NA	0.00	0.00%	1.40	0.71%	18854.30	6.86%
<b>Total Teaching Positions</b>	<b>8.00</b>	<b>100.00%</b>	<b>200.40</b>	<b>100.00%</b>	<b>274759.10</b>	<b>100.00%</b>

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: 11/26/23*

**Teacher Preparation and Placement (School Year 2021–22)**

<b>Authorization/Assignment</b>	<b>School Number</b>	<b>School Percent</b>	<b>District Number</b>	<b>District Percent</b>	<b>State Number</b>	<b>State Percent</b>
Fully (Preliminary or Clear) Credentialed for Subject and Student Placement (properly assigned)	0.00	0.00%	107.10	50.14%	234405.20	84.00%
Intern Credential Holders Properly Assigned	0.00	0.00%	13.90	6.54%	4853.00	1.74%
Teachers Without Credentials and Misassignments ("ineffective" under ESSA)	1.00	11.11%	36.20	16.95%	12001.50	4.30%
Credentialed Teachers Assigned Out-of-Field ("out-of-field" under ESSA)	0.00	0.00%	45.80	21.45%	11953.10	4.28%
Unknown/Incomplete/NA	8.00	88.89%	10.40	4.91%	15831.90	5.67%
<b>Total Teaching Positions</b>	<b>9.00</b>	<b>100.00%</b>	<b>213.70</b>	<b>100.00%</b>	<b>279044.80</b>	<b>100.00%</b>

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: 11/26/23*

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

Authorization/Assignment	2020–21 Number	2021–22 Number
Permits and Waivers	0.00	0.00
Misassignments	8.00	1.00
Vacant Positions	0.00	0.00
Total Teachers Without Credentials and Misassignments	8.00	1.00

Last updated: 11/2/23

## 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	0.00
Local Assignment Options	0.00	0.00
Total Out-of-Field Teachers	0.00	0.00

Last updated: 11/2/23

## 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%	11.1%
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%	11.1%

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: 11/2/23*



## Quality, Currency, Availability of Textbooks and Other Instructional Materials (School Year 2023–24)

Year and month in which the data were collected: 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 Squared?	Yes	0
Science			0
History-Social Science	Elementary: Imagine Learning - EL Education Middle School: ThinkLink - Foss Kit	Yes	0
Foreign Language	N/A		0
Health	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: 11/26/23

## School Facility Conditions and Planned Improvements

Last updated: 11/26/23

## School Facility Good Repair Status

OUSD own facility.

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: 2022

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

### Overall Facility Rate

Year and month of the most recent FIT report: 2022

Overall Rating	Good
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*Last updated: 11/26/23*

## 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 [CAA] 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. CAA 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:

1. **Smarter Balanced Summative Assessments and CAA for ELA** in grades three through eight and grade eleven.
2. **Smarter Balanced Summative Assessments and CAA for mathematics** in grades three through eight and grade eleven.
3. **California Science Test (CAST) and CAA 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 by Student Group for students taking and completed state-administered assessment

#### Grades Three through Eight and Grade Eleven (School Year 2022–23)

<b>Student Group</b>	<b>Total Enrollment</b>	<b>Number Tested</b>	<b>Percent Tested</b>	<b>Percent Not Tested</b>	<b>Percent Met or Exceeded</b>
All Students	131	128	97.71%	2.29%	23.62%
Female	59	58	98.31%	1.69%	27.59%
Male	72	70	97.22%	2.78%	20.29%
American Indian or Alaska Native	--	--	--	--	--
Asian	13	13	100.00%	0.00%	53.85%
Black or African American	--	--	--	--	--
Filipino	--	--	--	--	--
Hispanic or Latino	89	87	97.75%	2.25%	19.77%
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	--	--	--	--	--
White	--	--	--	--	--
English Learners	71	69	97.18%	2.82%	14.71%
Foster Youth	0	0	0%	0%	0%
Homeless	0	0	0%	0%	0%
Military	0	0	0%	0%	0%
Socioeconomically Disadvantaged	93	91	97.85%	2.15%	20.00%
Students Receiving Migrant Education Services	0	0	0%	0%	0%
Students with Disabilities	25	25	100.00%	0.00%	25.00%

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 CAA divided by the total number of students who participated in both assessments.

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

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: 1/7/24*

**CAASPP Test Results in Mathematics by Student Group for students taking and completed state-administered assessment**

**Grades Three through Eight and Grade Eleven (School Year 2022–23)**

<b>Student Group</b>	<b>Total Enrollment</b>	<b>Number Tested</b>	<b>Percent Tested</b>	<b>Percent Not Tested</b>	<b>Percent Met or Exceeded</b>
All Students	131	130	99.24%	0.76%	12.31%
Female	59	58	98.31%	1.69%	10.34%
Male	72	72	100.00%	0.00%	13.89%
American Indian or Alaska Native	--	--	--	--	--
Asian	13	13	100.00%	0.00%	46.15%
Black or African American	--	--	--	--	--
Filipino	--	--	--	--	--
Hispanic or Latino	89	89	100.00%	0.00%	7.87%
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	--	--	--	--	--
White	--	--	--	--	--
English Learners	71	71	100.00%	0.00%	7.04%
Foster Youth	0	0	0%	0%	0%
Homeless	0	0	0%	0%	0%
Military	0	0	0%	0%	0%
Socioeconomically Disadvantaged	93	92	98.92%	1.08%	9.78%
Students Receiving Migrant Education Services	0	0	0%	0%	0%
Students with Disabilities	25	25	100.00%	0.00%	16.00%

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 CAA divided by the total number of students who participated in both assessments.

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

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: 1/7/24*



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

<b>Subject</b>	<b>School 2021– 22</b>	<b>School 2022– 23</b>	<b>District 2021– 22</b>	<b>District 2022– 23</b>	<b>State 2021– 22</b>	<b>State 2022– 23</b>
Science (grades 5, 8, and high school)	14.89%	8.16%	0.00%	3.85%	29.47%	30.29%

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 CAA divided by the total number of students who participated in both assessments.

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

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: 1/7/24*

**CAASPP Test Results in Science by Student Group**  
**Grades Five, Eight and High School (School Year 2022–23)**

Student Group	Total Enrollment	Number Tested	Percent Tested	Percent Not Tested	Percent Met or Exceeded
All Students	50	50	100.00%	0.00%	10.00%
Female	22	22	100.00%	0.00%	4.55%
Male	28	28	100.00%	0.00%	14.29%
American Indian or Alaska Native	--	--	--	--	--
Asian	--	--	--	--	--
Black or African American	--	--	--	--	--
Filipino	0	0	0%	0%	0%
Hispanic or Latino	33	33	100.00%	0.00%	3.03%
Native Hawaiian or Pacific Islander	--	--	--	--	--
Two or More Races	--	--	--	--	--
White	--	--	--	--	--
English Learners	25	25	100.00%	0.00%	4.00%
Foster Youth	0	0	0%	0%	0%
Homeless	0	0	0%	0%	0%
Military	0	0	0%	0%	0%
Socioeconomically Disadvantaged	37	37	100.00%	0.00%	5.41%
Students Receiving Migrant Education Services	0	0	0%	0%	0%
Students with Disabilities	14	14	100.00%	0.00%	14.29%

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

*Last updated: 1/7/24*

**Career Technical Education (CTE) Programs (School Year 2022–23)**



**Career Technical Education (CTE) Participation (School Year 2022–23)**

Measure	CTE Program Participation
Number of Pupils Participating in CTE	--
Percent of Pupils that Complete a CTE Program and Earn a High School Diploma	--
Percent of CTE Courses that are Sequenced or Articulated Between the School and Institutions of Postsecondary Education	--

*Last updated: 1/7/24***Course Enrollment/Completion of University of California (UC) and/or California State University (CSU) Admission Requirements**

N/A

UC/CSU Course Measure	Percent
2022–23 Pupils Enrolled in Courses Required for UC/CSU Admission	0.00%
2021–22 Graduates Who Completed All Courses Required for UC/CSU Admission	0.00%

*Last updated: 1/7/24*

## 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

### California Physical Fitness Test Results (School Year 2022–23)

#### Percentage of Students Participating in each of the five Fitness Components

Grade	Component 1: Aerobic Capacity	Component 2: Abdominal Strength and Endurance	Component 3: Trunk Extensor and Strength and Flexibility	Component 4: Upper Body Strength and Endurance	Component 5: Flexibility
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Note: The administration of the PFT during 2021–22 and 2022–23 school years, only participation results are required for these five fitness areas.

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

*Last updated: 1/7/24*

## 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 2023–24)

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

Key avenues for involvement are:

- classroom volunteer
- participation in any classroom is encouraged
- presenting at an Assembly
- participation in parent and principal and executive director tea after weekly Assembly
- 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
- ELAC Council
- Food Bank

## State Priority: Pupil Engagement

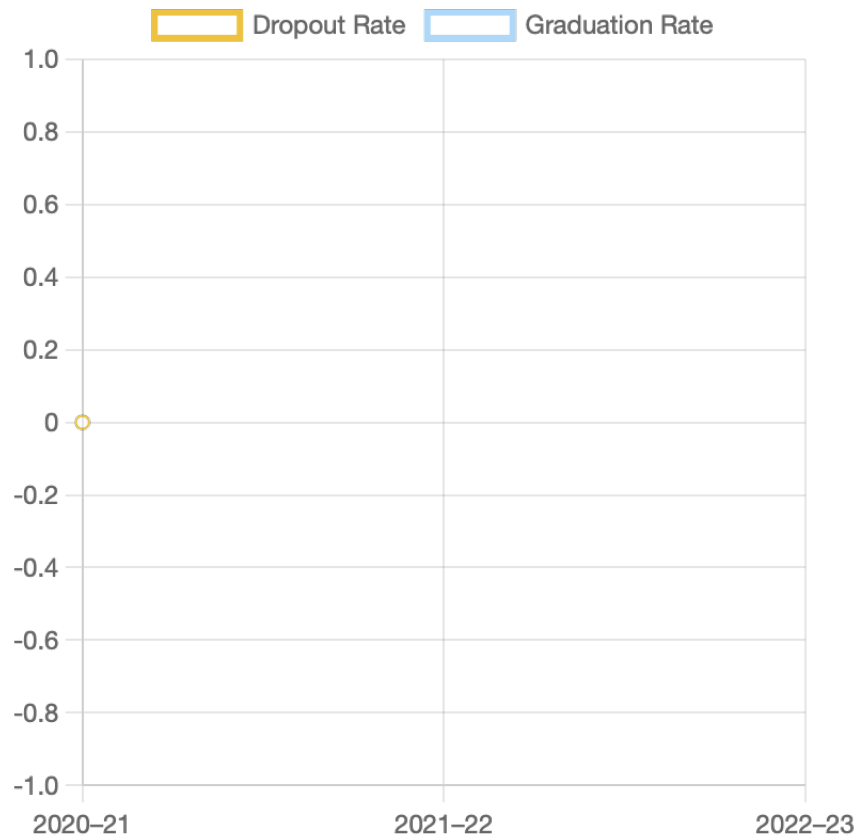
The SARC provides the following information relevant to the State priority: Pupil Engagement (Priority 5):

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

### Dropout Rate and Graduation Rate (Four-Year Cohort Rate)

Indicator	School 2020–21	School 2021–22	School 2022–23	District 2020–21	District 2021–22	District 2022–23	State 2020–21	State 2021–22	State 2022–23
Dropout Rate				31.9%	22.6%	25.5%	9.4%	7.8%	8.2%
Graduation Rate				55.4%	61.3%	59.8%	83.6%	87%	86.2%

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a student population is ten or fewer.



Last updated: 1/7/24

**Graduation Rate by Student Group (Four-Year Cohort Rate) (School Year 2022–23)**

<b>Student Group</b>	<b>Number of Students in Cohort</b>	<b>Number of Cohort Graduates</b>	<b>Cohort Graduation Rate</b>
All Students	0.0	0.0	0.0%
Female	0.0	0.0	0.0%
Male	0.0	0.0	0.0%
Non-Binary	0.0	0.0	0.0%
American Indian or Alaska Native	0.0	0.0	0.0%
Asian	0.0	0.0	0.0%
Black or African American	0.0	0.0	0.0%
Filipino	0.0	0.0	0.0%
Hispanic or Latino	0.0	0.0	0.0%
Native Hawaiian or Pacific Islander	0.0	0.0	0.0%
Two or More Races	0.0	0.0	0.0%
White	0.0	0.0	0.0%
English Learners	0.0	0.0	0.0%
Foster Youth	0.0	0.0	0.0%
Homeless	0.0	0.0	0.0%
Socioeconomically Disadvantaged	0.0	0.0	0.0%
Students Receiving Migrant Education Services	0.0	0.0	0.0%
Students with Disabilities	0.0	0.0	0.0%

For information on the Four-Year Adjusted Cohort Graduation Rate (ACGR), visit the CDE Adjusted Cohort Graduation Rate web page at <https://www.cde.ca.gov/ds/ad/acgrinfo.asp>.

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a student population is ten or fewer.

*Last updated: 1/7/24*

**Chronic Absenteeism by Student Group (School Year 2022–23)**

<b>Student Group</b>	<b>Cumulative Enrollment</b>	<b>Chronic Absenteeism Eligible Enrollment</b>	<b>Chronic Absenteeism Count</b>	<b>Chronic Absenteeism Rate</b>
All Students	225	210	102	48.6%
Female	111	103	55	53.4%
Male	114	107	47	43.9%
Non-Binary	0	0	0	0.0%
American Indian or Alaska Native	3	2	2	100.0%
Asian	21	19	2	10.5%
Black or African American	28	24	16	66.7%
Filipino	2	2	0	0.0%
Hispanic or Latino	134	131	64	48.9%
Native Hawaiian or Pacific Islander	5	5	4	80.0%
Two or More Races	12	9	8	88.9%
White	8	7	4	57.1%
English Learners	114	113	50	44.2%
Foster Youth	2	1	1	100.0%
Homeless	1	1	1	100.0%
Socioeconomically Disadvantaged	179	170	87	51.2%
Students Receiving Migrant Education Services	0	0	0	0.0%
Students with Disabilities	41	39	22	56.4%

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

*Last updated: 1/7/24*



## 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

Rate	School 2020– 21	School 2021– 22	School 2022– 23	District 2020– 21	District 2021– 22	District 2022– 23	State 2020– 21	State 2021– 22	State 2022– 23
Suspensions	0.00%	0.88%	3.11%	0.02%	2.97%	2.19%	0.20%	3.17%	3.60%
Expulsions	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.07%	0.08%

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a selected student population is ten or fewer.

*Last updated: 1/7/24*

**Suspensions and Expulsions by Student Group (School Year 2022–23)**

<b>Student Group</b>	<b>Suspensions Rate</b>	<b>Expulsions Rate</b>
All Students	3.11%	0.00%
Female	3.60%	0.00%
Male	2.63%	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	3.57%	0.00%
Filipino	0.00%	0.00%
Hispanic or Latino	2.99%	0.00%
Native Hawaiian or Pacific Islander	0.00%	0.00%
Two or More Races	0.00%	0.00%
White	0.00%	0.00%
English Learners	3.51%	0.00%
Foster Youth	0.00%	0.00%
Homeless	0.00%	0.00%
Socioeconomically Disadvantaged	2.79%	0.00%
Students Receiving Migrant Education Services	0.00%	0.00%
Students with Disabilities	2.44%	0.00%

Note: To protect student privacy, double dashes (--) are used in the table when the cell size within a student population is ten or fewer.

*Last updated: 1/7/24*

## **School Safety Plan (School Year 2023–24)**

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

Last Reviewed with Staff on August 7, 2023.

*Last updated: 1/7/24*

## 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 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)**

<b>Grade Level</b>	<b>Average Class Size</b>	<b>Number of Classes* 1-20</b>	<b>Number of Classes* 21-32</b>	<b>Number of Classes* 33+</b>
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 (Elementary) (School Year 2022–23)**

<b>Grade Level</b>	<b>Average Class Size</b>	<b>Number of Classes* 1-20</b>	<b>Number of Classes* 21-32</b>	<b>Number of Classes* 33+</b>
K	18.00	1	0	0
1	20.00	1	0	0
2	21.00	0	1	0
3	21.00	0	1	0
4	19.00	1	0	0
5	32.00	0	1	0
6	21.00	0	1	0
Other**	0.00	0	0	0

\* 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 2020–21) (HIGH SCHOOL)

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) (HIGH SCHOOL)

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 2022–23) (HIGH SCHOOL)**

<b>Subject</b>	<b>Average Class Size</b>	<b>Number of Classes* 1-22</b>	<b>Number of Classes* 23-32</b>	<b>Number of Classes* 33+</b>
English Language Arts	0.00	0	0	0
Mathematics	0.00	0	0	0
Science	0.00	0	0	0
Social Science	0.00	0	0	0

\* 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: 1/7/24*

**Student Support Services Staff (School Year 2022–23)**

<b>Title</b>	<b>Number of FTE* Assigned to School</b>
Counselor (Academic, Social/Behavioral or Career Development)	1.00
Library Media Teacher (Librarian)	0.00
Library Media Services Staff (Paraprofessional)	0.00
Psychologist	0.50
Social Worker	0.00
Nurse	0.00
Speech/Language/Hearing Specialist	0.50
Resource Specialist (non-teaching)	2.00
Other	0.00

\* 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: 1/7/24*

**Expenditures Per Pupil and School Site Teacher Salaries (Fiscal Year 2021–22)**

<b>Level</b>	<b>Total Expenditures Per Pupil</b>	<b>Expenditures Per Pupil (Restricted)</b>	<b>Expenditures Per Pupil (Unrestricted)</b>	<b>Average Teacher Salary</b>
School Site	\$3763132.00	\$18629.00	\$0.00	\$55120.00
District	N/A	N/A	--	--
Percent Difference – School Site and District	N/A	N/A	--	--
State	N/A	N/A	\$7606.62	--
Percent Difference – School Site and State	N/A	N/A	--	--

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

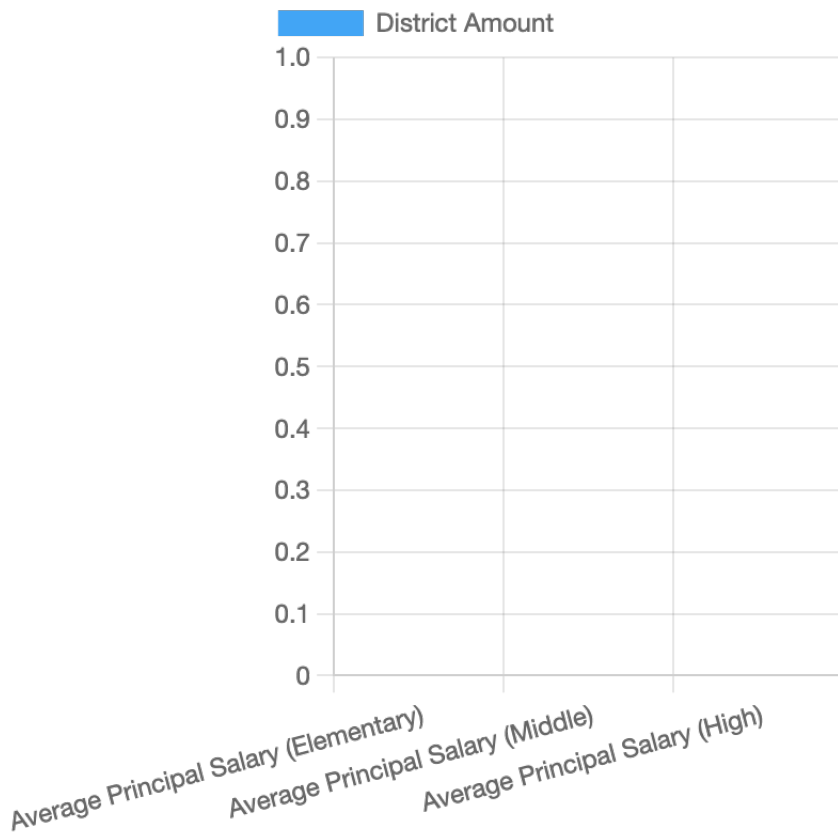
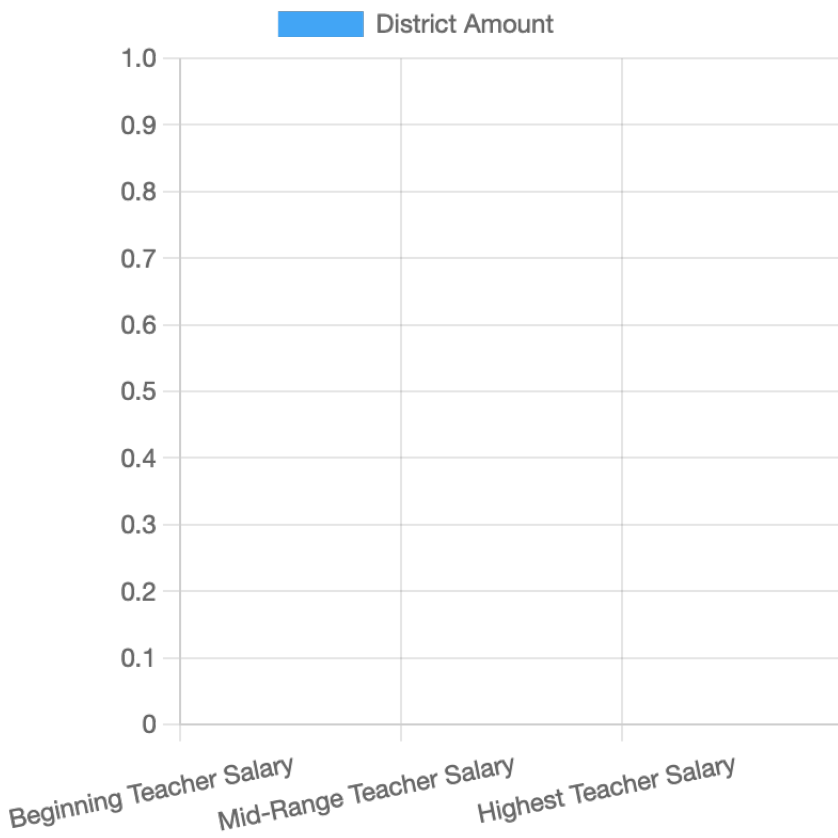
Last updated: 1/7/24

### Teacher and Administrative Salaries (Fiscal Year 2021–22)

<b>Category</b>	<b>District Amount</b>	<b>State Average For Districts In Same Category</b>
Beginning Teacher Salary	\$0.00	\$0.00
Mid-Range Teacher Salary	\$0.00	\$0.00
Highest Teacher Salary	\$0.00	\$0.00
Average Principal Salary (Elementary)	\$0.00	\$0.00
Average Principal Salary (Middle)	\$0.00	\$0.00
Average Principal Salary (High)	\$0.00	\$0.00
Superintendent Salary	\$0.00	\$0.00
Percent of Budget for Teacher Salaries	0.00%	0.00%
Percent of Budget for Administrative Salaries	0.00%	0.00%

For detailed information on salaries, see the CDE Certificated Salaries & Benefits web page at <https://www.cde.ca.gov/ds/fd/cs/>.





Last updated: 1/7/24

## Professional Development

<b>Measure</b>	<b>2021– 22</b>	<b>2022– 23</b>	<b>2023– 24</b>
Number of school days dedicated to Staff Development and Continuous Improvement	12	13	13

*Last updated: 1/7/24*

# Coversheet

## ProCare Therapy Contract Approval

**Section:** IV. Academic Excellence  
**Item:** D. ProCare Therapy Contract Approval  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** ProCare Therapy Community School for Creative Education.pdf  
ProCare Therapy Addendum.pdf

**CLIENT SERVICES AGREEMENT**

Charter Schools and Non-Public Schools or Districts



ProCare Therapy, a d/b/a of New Direction Solutions, LLC (“ProCare”) and Community School For Creative Education whose principal location is 2111 International Blvd, Oakland, CA 94606 (“Client”), a charter school, whether public or private, non-public school or district, enter into this non-exclusive Client Services Agreement (“Agreement”) for the purpose of referring and placing Consultants (“Consultants”) with Client. This Agreement shall govern the overall terms of the relationship, while a separate Client Assignment Confirmation for each placement will outline specifics as to bill rates, personnel, and assignment lengths.

**1. Scope of Services.**

ProCare will use its commercially reasonable efforts to provide Consultants for assignment with Client. ProCare will be responsible for payment of each Consultant's wages and applicable payroll taxes, deductions, and insurance, including worker's compensation, general liability and professional liability coverage for the benefit of the Consultants. If a Consultant is unable to complete the specified assignment, ProCare will use its commercially reasonable efforts to find a replacement in a timely manner.

**2. Independent Contractor.**

The parties hereto specify and intend that the relationship of each to the other is that of an independent contractor, that each Consultant shall be an employee of ProCare and that no qualified Consultant shall at any time be an employee of Client, unless the parties shall otherwise agree in writing. ProCare agrees to provide and maintain all payroll services for any qualified Consultant placed with Client, to maintain payroll records and to withhold and remit all payroll taxes and social security payments. ProCare does not ordinarily use subcontractors in providing services. Should the need to use a separate staffing firm or independent contractor arise, ProCare will notify Client in advance of the assignment in order to receive approval of this arrangement.

**3. Telepractice Services.**

ProCare, at Client's specific request, may provide telepractice services through VocoVision. Should utilization of VocoVision occur, Client shall, at that time, receive in addition to Addendum A – Client Assignment Confirmation, an Addendum B – Teleservices Provisions, Addendum C – Duties and Responsibilities and Addendum D – VocoVision Equipment Policies which, collectively, outline specific terms and conditions regarding VocoVision's telepractice services.

**4. Insurance.**

ProCare will maintain at least the following minimum amounts of insurance:

General Liability - \$2,000,000 per occurrence and \$4,000,000 aggregate.

Workers Compensation - in accordance with state regulations.

Employer's Liability - \$1,000,000.

Excess Liability over General Liability and Employer's Liability - \$5,000,000 per occurrence and \$5,000,000 aggregate.

Professional Liability - \$1,000,000 per occurrence and \$3,000,000 aggregate.

Sexual Abuse and Molestation - \$1,000,000 per occurrence and \$3,000,000 aggregate

**5. Competency and Licensing.**

ProCare will conduct comprehensive pre-employment screening to provide licensed Consultants who meet applicable professional standards. ProCare will endeavor to present only Consultants who are qualified for Client's open position(s) on job requirements established by Client either verbally or in writing. While ProCare will make every effort to pre-screen job candidates based on these requirements, Client acknowledges the candidate assignment decision is ultimately the responsibility of the Client. To this end, ProCare will make available to Client all appropriate Consultant records that ProCare may permissibly disclose and will facilitate an interview between Client and Consultant in order to assist Client in the hiring decision. ProCare will do its due diligence to ascertain the professional and applicable Department of Education licensing and certification requirements for the Consultant discipline placed with Client, however, it is ultimately the responsibility of the Client to approve the Consultant's licensure and certifications as acceptable.

**6. On-Site Responsibility.**

Client is responsible for providing all support, facilities, training, direction, materials, supplies, and means for the Consultant to complete the assignment. Client acknowledges that ProCare is not providing special

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education and/or related services, but rather is providing candidate identification and placement services. As such, Client is responsible for the Consultant's adherence to the applicable standard of care and acknowledges that ProCare is not responsible for the Consultant's on-site performance. Client warrants that its facilities and operations will comply at all times with all federal, state and local safety and health laws, regulations and standards, including OSHA standards, and that Client will be responsible for providing all safety training and equipment, and for each Consultant's compliance with health and safety requirements, including those instituted by Client.

**7. Employment of Consultants.**

Client agrees that it will not directly or indirectly, personally or through an agent or agency, contract with or employ any Consultant introduced or referred by ProCare for a period of (12) months after the latest date of introduction, referral, placement, or termination or expiration of the contract assignment. If Client or its affiliate enters into such a relationship or refers Consultant to a third party for employment, Client agrees to pay an amount equal to \$22,500 or thirty-five (35) percent (whichever is greater) of the Consultant's first year's annual salary, including any signing bonus, as agreed upon at the time of hiring. Payment is due and payable to ProCare upon start date.

**8. Equal Opportunity.**

It is the policy of ProCare to provide equal opportunity to all Consultants for employment. ProCare and Client will screen based on merit only. All Consultants will be free from discrimination due to race, religion, color, sex, national origin, age, or disability.

**9. Timekeeping and Invoicing.**

Client will ensure that Consultants accurately record the start and stop times for all hours worked, in accordance with the Client's policies utilizing the Client designated method which may include the submission of ProCare's timesheet. Timesheets are due weekly by 12:00 PM on the Monday following the end of Client's designated workweek.

ProCare will generate an invoice for Client based on timesheets submitted. Client must review the invoice and notify ProCare of any errors, including billed hours or improper rates, immediately and in writing. Invoicing errors not received within thirty (30) days of the date of invoice shall not be disputed and invoices will be due in full.

**10. Deposit and Payment Terms.**

Client will be billed for a deposit per Consultant in the amount equal to one (1) month's billings or Five Thousand dollars (\$5,000) whichever is greater that will be due and payable five (5) business days prior to the scheduled first day of work by the assigned Consultant. At the conclusion of the Consultant(s)'s assignment(s), including any extensions, the deposit shall be applied to any remaining invoices or returned to the client if all invoices are paid in full. Public funding sources do not waive the requirement for deposit.

Client will be billed on a weekly basis for work performed during the previous week and pay ProCare based on the service charges specified in the Assignment Confirmation included as an addendum to this Agreement. ProCare pays its Consultant(s) overtime in compliance with federal, state, and/or local laws. ProCare will bill Client at one and on-half times the regular bill rate for all hours ProCare is required to pay the Consultant(s) overtime. It is Client's responsibility to notify ProCare if pre-approval is required for any or all overtime hours prior to any such hours being worked. **Payment is due within fifteen (15) days of receipt of invoice.**

**11. Default Charges.**

Invoices shall be considered past due if not paid by the agreed-upon due date. Client agrees to pay all necessary collection costs of amounts past due, including reasonable attorney's fees and costs. Additionally, ProCare reserves the right to approve or to discontinue any extension of credit and the terms governing such credit.

**12. Limitation of Liability.**

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NEITHER PARTY SHALL BE LIABLE TO THE OTHER WHATSOEVER FOR ANY SPECIAL, CONSEQUENTIAL, INDIRECT, EXEMPLARY OR PUNITIVE DAMAGES, INCLUDING ANY DAMAGES ON ACCOUNT OF LOST PROFITS, LOST DATA, LOSS OF USE OF DATA, OR LOST OPPORTUNITY, WHETHER OR NOT PLACED ON NOTICE OF ANY SUCH ALLEGED DAMAGES AND REGARDLESS OF THE FORM OF ACTION IN WHICH SUCH DAMAGES MAY BE SOUGHT. THE FEES AND BILLINGS DUE UNDER THIS AGREEMENT ARE NOT CONSIDERED SPECIAL DAMAGES OR LOST PROFITS AND SHALL NOT BE LIMITED BY THESE PROVISIONS.

**13. Administrative Responsibilities.**

Client shall be responsible for orienting Consultant to Client's policies and procedures regarding the submission of any requisite paperwork which must be tendered for reimbursement by funding entities such as Medicare, Medicaid, or health insurance. Such paperwork may include, but is not limited to, patient care plans, comprehensive patient histories, individual education plans, or Client specific program plans. During the contracted assignment, should Consultant fail to submit paperwork as required per Client's policies and procedures, Client must notify ProCare in writing within three (3) business days of alleged failure. Failure to notify ProCare before assignment ends shall negate any Client claim to withhold payment due to untimely work and/or paperwork non-compliance by Consultant. Client agrees that all approved time sheets by Client's assigned representative are not subjected to billing dispute if Client fails to notify ProCare of time sheet and work performed discrepancies.

**14. Incident and Error Tracking.**

Client will report to ProCare any performance issues, incidents, errors and other events related to the care and services provided by ProCare Consultants. ProCare will document reported incidents in Consultant's personnel file and track all such events for quality assurance purposes. All supporting documentation is required within seventy-two (72) hours of the occurrence.

**15. Reporting of Work-Related Injuries.**

Client will maintain a safe working environment and provide all appropriate personal protective equipment as deemed appropriate for unit to which ProCare's Consultant has been assigned. Client ensures compliance with all applicable OSHA or state Department of Labor obligations to include general training on the reporting of work-place injuries, incidents, and occupational exposure to bloodborne pathogens occurring at Client facility. Records of such occurrences must be maintained by the Client and accessible to ProCare within guidelines set forth by governing entities. In the event of work-place injury, incident or exposure, each affected Consultant will contact their immediate Client-appointed supervisor and report to the applicable treating department as per Client protocol. Consultant shall also report work-place injury, incident or exposure to ProCare concurrently with Client for the purpose of reporting such event to ProCare's workers compensation carrier. If ProCare's Consultants are not eligible for treatment of work-place injury, incident or exposure by Client or if reporting requirements change during the term of this Agreement, Client is responsible for written notification of such information to both ProCare and ProCare's Consultant.

**16. Termination of Contracted Assignment with Cause.**

Immediately upon occurrence, Client has the obligation to report each deviation from the accepted standard of practice, policies and procedures as orientated to Consultant, behavior, and or any incident that would be considered adverse to the overall operation of Client. Client may request that ProCare facilitate the immediate removal of Consultant due to any of the issues preceding with written and/or verbal notice. The Client, however, may not immediately terminate a Consultant unless ProCare has been notified prior to final incident or unless a single incident warrants immediate dismissal prior to ProCare's notification. All supporting documentation specifying the reasons and facts of the termination is required within forty-eight (48) hours of termination. If the Client does not report such deviation(s) and subsequently terminates Consultant or if Client does not provide required documentation following a termination within the required timeframe, Client will be assessed as liquidated damages and not as a penalty, an amount equal to one (1) week of billing. The parties agree that ProCare's Consultants are an integral part of its operation and a resource that may have been developed over a number of years. Any delay or absence of a written and verbal notice could result in lost revenue or other consequences not foreseen at this time and therefore the liquidated damages are not unreasonable to the probable loss to be suffered by ProCare in the event of your breach of this provision.

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Charter Schools and Non-Public Schools or Districts



Client will be responsible for all professional fees (and expenses if applicable) up to the point of termination. Termination with cause must be documented prior to termination in accordance with the Incident and Error Tracking procedures set forth in paragraph 14 of this agreement. ProCare shall have five (5) business days to refill the position in the event of termination with cause. Should ProCare identify a suitable Consultant, Client agrees to original terms or extended terms of the terminated Consultants assignment.

**17. Termination of Contracted Assignment without Cause.**

Client may cancel an assignment with thirty (30) days written notice. Client is responsible for all charges and fees prior to cancellation date and through the 30-day period of notice. In the event Client is unable to provide thirty (30) days' notice of termination, Client will be billed for thirty (30) days at the agreed upon regular bill rate and minimum hours. In the event of termination without cause, Client will be responsible for any housing and travel costs actually incurred by ProCare as a result of such cancellation.

**18. Guaranteed Minimum Hours.**

Client agrees to provide Consultant the guaranteed number of work hours per week specified in the attached Assignment Confirmation Addendum A. Cancellation of prescheduled shift(s) or reduction in work hours by Client will be billed reflecting the guaranteed minimum work hours.

**19. Paid Sick Leave.**

For those jurisdictions that have passed or will pass legislation requiring Paid Sick Leave, Paid Sick Time will be billed back to Client at the straight-time bill rate for all hours taken by any Consultant assigned to Client. This section is not applicable until the effective date of such legislation has been reached.

**20. Unscheduled Facility Closure Policy.**

ProCare will incur fixed expenses over the entire course of a Consultant's contract assignment with Client related to the Consultant's housing and per diem costs. The parties agree that in the event of an unforeseen or unexpected interruption in a Consultant's assignment resulting from an unscheduled closure, complete or partial, of Client's facilities due to natural or manmade disasters, such as, and without limiting the generality of the foregoing, fire, storms, flooding, earthquake, labor unrest, riots, and/or acts of terrorism or war (each an "Unscheduled Closure"), Client will transition to virtual services for all Consultants whose services can be performed in such a setting. Client shall be billed for services performed at the regular contracted hourly bill rate for all hours worked by Consultant. Virtual service hours shall be entered and processed according to the normal time submittal and approval process unless otherwise requested by Client and agreed upon by ProCare. ProCare and Client will mutually determine which contracted disciplines qualify for virtual services. For contracted services not eligible for virtual services, Client will be invoiced and shall pay for each such affected Consultant's services at the reduced rate of \$200 per day for each day that the Consultant(s) is unable to work by virtue of such Unscheduled Closure.

**21. Multiple Locations.**

If client requires Consultant to travel to and perform services at more than one location, Client will compensate ProCare for travel time between facilities at the regular hourly bill rate and for mileage up to the current acceptable IRS reimbursement rate.

**22. Issue Resolution.**

In the event Client encounters an issue that is not satisfactorily resolved by its ProCare representative, Client should escalate the issue to the appropriate ProCare manager by calling: 800-825-7133. Please ask for your account representative's manager.

**23. Indemnification.**

Each party will indemnify, defend and hold harmless the other against third party claims arising from breaches of the parties' respective obligations under this Agreement.

**24. Confidentiality.**

Each party acknowledges that as a result of this Agreement, they will learn confidential information of the other party. Confidential information is defined as that information which is private to each party but is shared by one

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**CLIENT SERVICES AGREEMENT**

Charter Schools and Non-Public Schools or Districts



to the other party as required to accomplish this Agreement and **includes bill rates, fees for permanent placements and terms and conditions of this Agreement.** It is agreed that neither party will disclose any confidential information of the other party to any person or entity. Neither will it permit any person nor entity to use said confidential information.

Disclosures required by law including properly executed Freedom of Information Act requests and information shared to the appropriate individuals within the respective organizations as necessary to execute this Agreement shall be the only exceptions permitted under this Agreement.

Confidential Information of ProCare shall include, but is not limited to, any and all unpublished information owned or controlled by ProCare and/or its Consultants, that relates to the clinical, technical, marketing, business or financial operations of ProCare and which is not generally disclosed to the public including but not limited to Consultant information, technical data, policies, financial data and information to include contract terms and provisions, billing rates, permanent placement fees whether disclosed orally, in writing or by inspection. If the receiving party shall attempt to use or dispose of any of the Confidential Information, or any duplication or modification thereof, in any manner contrary to the terms of the foregoing, the disclosing party shall have the right, in addition to such other remedies which may be available to it, to obtain an injunctive relief enjoining such acts or attempts as a court of competent jurisdiction may grant, it being acknowledged that legal remedies are inadequate.

**25. Family Education Rights and Privacy Act.**

ProCare shall comply with all laws, rules and regulations pursuant to the Family Educational Rights and Privacy Act, 20 USC 1232g ("FERPA") and acknowledges that certain information about the Client's students is contained in records maintained by ProCare and the Consultant and that this information can be confidential by reason of FERPA and related Client policies. Both parties agree to protect these records in accordance with FERPA and Client policy. To the extent permitted by law, nothing contained herein shall be construed as precluding either party from releasing such information to the other so that each can perform its respective responsibilities. As it applies, Consultants assigned to Client will execute a FERPA Statement of Understanding outlining appropriate guidelines.

**26. State Retirement System Notice.**

Client acknowledges and agrees that if formal notice is required to be given to any Consultant that participation in any such retirement system/pension is either: 1) permitted by Consultant's election; or 2) is required by law, then Client is solely responsible for providing such notice to Consultant s and fulfilling all associated administrative duties. Client shall immediately notify ProCare if any Consultant is required to, or voluntarily elects to participate in any such system. In such event, Client shall advise ProCare of the withholding obligation percentages (both employer and employee share) so that invoices to Client and payment to the Consultant may be adjusted accordingly. The parties agree that Client shall withhold and pay to the retirement/pension both the employee and employer shares. The parties agree that the applicable employee and employer shares paid to the system by the Client shall be deducted from the amount owed to ProCare by the Client hereunder. The parties agree that the applicable employee share paid to the system by the Client shall be deducted from the amount due the Consultant by ProCare. The Client and ProCare expressly acknowledge and agree that if any Consultant is required to, or elects to participate in a retirement system/pension, the Client shall be solely responsible for: 1) creating an account for Consultant with the appropriate retirement system/pension; 2) all present and/or future obligations to make employee and employer cash payments/ contributions to the retirement system/pension as required by law and/or set by the retirement system/pension; and 3) otherwise administering all employer functions pertaining to the Consultant's interest in retirement system/pension.

**27. Conflicts of Interest.**

The parties acknowledge their respective obligation to report any conflict of interest and/or apparent conflict of interest that may interfere with their ability to perform their obligations hereunder objectively and effectively. To that end, the Parties hereby certify and represent that their officials, employees and agents do not have any significant financial or other pecuniary interest in the other party's business enterprise, and that no inducements of monetary or other value were offered or given to any officer, employee or agent of the other

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**CLIENT SERVICES AGREEMENT**  
Charter Schools and Non-Public Schools or Districts



party. Each party agrees to promptly notify the other in the event it becomes aware of any conflict of interest or apparent conflict of interest.

**28. Notices.**

All notices required to be given in writing will be sent to the names/addresses listed below.

**ProCare Therapy**  
Contract Department  
5550 Peachtree Parkway  
Suite 500  
Peachtree Corners, GA 30092  
[ContractNotices@procaretherapy.com](mailto:ContractNotices@procaretherapy.com)

**To Client**  
Client: Community School For Creative Education  
Address: 2111 International Blvd, Oakland, CA 94606

**29. Survival.**

The parties' obligations under this Agreement which by their nature continue beyond termination, cancellation or expiration of this Agreement, shall survive termination, cancellation or expiration of this Agreement.

**30. Governing Law.**

This Agreement shall be governed by the laws of the state of Delaware.

**31. Termination of Agreement.**

Either party may terminate this Agreement for any reason with thirty (30) days written notice. Any deposit or balance of deposit on account for Client will be refunded after all outstanding invoices are satisfied.

**32. Modification of Agreement.**

This Agreement may not be modified, amended, suspended, or waived, except by the mutual written agreement of the Parties who are authorized to execute the agreement.

**33. Entire Agreement.**

This Agreement represents the entire agreement between the parties and supersedes any prior understandings or agreements whether written or oral between the parties respecting the subject matter herein. This Agreement may only be amended in a writing specifically referencing this provision and executed by both parties. This Agreement shall inure to the benefit of and shall be binding upon the parties hereto and their respective heirs, personal representatives, successors and assigns, subject to the limitations contained herein. The unenforceability, invalidity or illegality of any provision of this Agreement shall not render any other provision unenforceable, invalid or illegal and shall be subject to reformation to the extent possible to best express the original intent of the parties. This Agreement and attached Assignment Confirmation contain terms that may only be altered when agreed upon in writing by both parties.

***This Agreement and attached Assignment Confirmation contain terms that may only be altered when agreed upon in writing by both parties.***

CLIENT ID – CLIENT NAME

**CLIENT SERVICES AGREEMENT**  
Charter Schools and Non-Public Schools or Districts



**346916 Community School For Creative Education**

**New Directions Solutions, LLC dba ProCare Therapy**

\_\_\_\_\_  
Client Representative Signature                      Date

\_\_\_\_\_  
Client Representative Signature                      Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title



## ADDENDUM A Client Assignment Confirmation

This Client Assignment Confirmation is entered into and executed as of the signature date below and supplements the Client Services Agreement between the Client and New Direction Solutions, LLC dba ProCare Therapy ("ProCare"). Client will pay ProCare for hours worked by Consultant on the following terms:

### Assignment Details

ProCare Consultant: Kathleen Harrison-Ellis PID: \*

School District Name (Client): Community School For Creative Education

Start Date: 01/29/2024 End Date: 05/24/2024

*Start and End dates are subject to change based on the credentialing and licensure process as well as adjustment in the school district's calendar.*

Position: Paraprofessional

Bill Rate: \$55.00 Minimum Hours: 35

Overtime Rate: 1.5 times Bill Rate

Billing Workweek: Monday – Friday

Miscellaneous: \*

Sales tax or gross receipts tax will be added to professional fees if required or allowed by state law and client is not a tax-exempt entity.

If ProCare Consultant should be required to travel to other locations at the specific request of the Client, the Client will be responsible for all expenses incurred.

Client agrees that it will not directly or indirectly, personally or through an agent or agency, contract with or employ any Consultant introduced or referred by ProCare for a period of (12) months after the latest date of introduction, referral, or end of contract placement. If Client or its affiliate enters into such a relationship or refers Consultant to a third party for employment, Client agrees to pay an amount equal to \$22,500 or thirty-five (35) percent (whichever is greater) of the Consultant's first year's annual salary, including any signing bonus, as agreed upon at the time of hiring. Payment is due and payable to ProCare upon start date.

Option of virtual services will be offered by ProCare in lieu of onsite services.

All precautions will be taken by the Client to create a safe and healthy environment.

The Consultant working this assignment is subject to the California Meal and Rest Break Period Laws. Client shall adhere to and enforce the state-mandated meal and rest breaks as defined within California's Wage and Hour Laws.

Account Representative Information: Alyssa Martin  
 alyssa.martin@procaretherapy.com  
 904-309-9667

By: 346916 Community School For Creative Education  
 Print Name: \_\_\_  
 Title: \_\_\_  
 Date: \_\_\_

By: New Directions Solutions, LLC dba ProCare Therapy  
 Print Name: \_\_\_  
 Title: \_\_\_  
 Date: \_\_\_

**\*Terms and conditions outlined in this Client Assignment Confirmation will be considered agreed upon by all parties unless ProCare is notified of changes by Client within forty-eight (48) hours of client's receipt of this Client Assignment Confirmation.**

# Coversheet

## LCAP Mid-Year Progress Report

**Section:** IV. Academic Excellence  
**Item:** E. LCAP Mid-Year Progress Report  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 2024 LCAP Mid-Year Monitoring Report 23-24.pdf

# Monitoring Goals, Actions, and Resources for the 2023-24 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2023-24 LCAP template and instructions should be consulted when completing required documents.

(6) (A) The superintendent of the school district shall present a report on the annual update to the local control and accountability plan and the local control funding formula budget overview for parents on or before February 28 of each year at a regularly scheduled meeting of the governing board of the school district. (B) The report shall include both of the following: (i) All available midyear outcome data related to metrics identified in the current year's local control and accountability plan. (ii) All available midyear expenditure and implementation data on all actions identified in the current year's local control and accountability plan.

Local Educational Agency (LEA) Name	Contact Name and Title	Email and Phone
Community School for Creative Education	Phillip Gedeon Head of School	headofschool@communityschoolforcreativeeducation.org 510-686-4131

## Goal 1

### Goal Description

Increase student achievement for all students

## Expected Annual Measurable Objectives

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
SBAC ELA All Students	-41.9 DfS 2018-19	-26.9 DFfS 2021-22		Mid-year assessment evaluation in process.	-6.9 DfS
SBAC ELA African American	--31.2 DfS 2018-19	-16.2 DfS 2021-22		Mid-year assessment evaluation in process.	-6.2 DfS
SBAC ELA English Learners	-54.8 DfS 2018-19	-34.8 DfS 2021-22		Mid-year assessment evaluation in process.	-14.8 DfS
SBAC ELA Latino	-58.3 DfS 2018-19	-38.3 DfS 2021-22		Mid-year assessment evaluation in process.	-8.3 DfS
SBAC ELA Socioeconomically Disadvantaged	-42.2 DfS 2018-19	-27.2 DfS 2021-22		Mid-year assessment evaluation in process.	-7.2 DfS

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
SBAC ELA Students with Disabilities	-53.9 Dfs 2018-19	-27.2 DfS 2021-22		Mid-year assessment evaluation in process.	-13.9 DfS
SBAC Math All Students	-63.6 DFS 2018-19	-48.6 DfS 2021-22		Mid-year assessment evaluation in process.	-25.0 DfS
SBAC Math African American	-55.3 DfS 2018-19	-40.3 DfS 2021-22		Mid-year assessment evaluation in process.	-22.3 DfS
SBAC Math English Learners	-71.1 DfS 2018-19	-51.1 DfS 2021-22		Mid-year assessment evaluation in process.	-25.0 DfS
SBAC Math Latino	-82.0 DfS 2018-19	-62.0 DfS 2021-22		Mid-year assessment evaluation in process.	-32.0 DfS
SBAC Math Socioeconomically Disadvantaged	-65.9 DfS 2018-19	-50.9 DfS 2021-22		Mid-year assessment evaluation in process.	-25.0 DfS
SBAC Math Students with Disabilities	-66.9 DfS 2018-19	-51.9 DfS 2021-22		Mid-year assessment evaluation in process.	-25.0 DfS
Suspension All Students	4.7% 2018-19	3.7% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	3.1%
Suspension African American	7.0% 2018-19	4.0% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	2.7%
Suspension Asian	0.0 2018-19	0.5% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	0.5%
Suspension Latino	3.4% 2018-19	3.1% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	2.5%
Suspension Two or More Races	17.4% 2018-19	6.0% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	2.7%
Suspension Socioeconomically Disadvantaged	5.4% 2018-19	4.4% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	3.1%
Suspension Students with Disabilities	23.8% 2018-19	6.0% 2021-22		Current projects show that we are on target to reach	2.5%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
				or exceed our desired outcome.	
Chronic Absenteeism All Students	23.2% 2018-19	17.2% 2021-22		Current projects show that our chronic absenteeism for all students will be greater than our desired outcome.	11.2%
Chronic Absenteeism African American	37.3% 2018-19	20.0% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	11.0%
Chronic Absenteeism Asian	7.7% 2018-19	7.2% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	6.2%
Chronic Absenteeism English Learners	14.6% 2018-19	11.6% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	9.4%
Chronic Absenteeism Latino	20.2% 2018-19	14.2% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	9.5%
Chronic Absenteeism Two or More Races	33.3% 2018-19	20.0% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	11.0%
Chronic Absenteeism Socioeconomically Disadvantaged	25.6% 2018-19	19.6% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	13.6%
Students with Disabilities	24.4% 2018-19	18.4% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	12.4%
Suspensions English Learners	3.9%	3.6% 2021-22		Current projects show that our chronic absenteeism for this demographic will	3.0%

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
				be greater than our desired outcome.	

**Actions & Measuring and Reporting Results**

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures
1.1	<p><b>CORE</b></p> <p>Action 1.1: Implement Guided Reading Groups to meet students' individual needs as identified by reading assessments: Fountas &amp; Pinnell, ELPAC, NWEA MAP, SBAC (1.1, 1.2, 1.4)</p> <p>a. All classroom teachers do Reading Workshop and Writing Workshop models review, grade-level and vertical team planning; teachers not yet CLEARed receive regular session with in-house BTSA coach; all teachers receive choice every trimester to model lesson, observe a lesson or be observed; all receive trimester support in planning upcoming block, and support implementation year round through walk-throughs from Head of School and Assistant Head of School and other members of the Instructional Leadership Team (ILT), and/or at regular intervals joined by Instruction Partners and Waldorf Coaches using the CSCE Classroom Observation Tool and Planning Tool Use designed in collaboration with Instruction Partners 2023-2024. The Instruction Partners Coach will support throughout the year both classroom walk throughs and block design.</p> <p>b. Administer assessments for identified students every four weeks for those below grade level in reading, and for all every eight weeks to track and regroup students according to their progress.</p> <p>C.Continue to strengthen and test Waldorf inspired integrated MTSS plan (M-RTI and PBIS/Restorative Justice) to identify and support students who are not making progress and accelerate reading instruction accordingly.</p> <p>c. Increase teacher collaboration time to review data and plan individualized instruction through dedicated time every Wednesday joined with planned review of data</p>	Yes	\$904,290.24	\$443,334



Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures
	after every testing window during Wednesday collaboration.			
1.2	<p><b>Actions for English Learners and Other Groups not at grade level</b></p> <p>Action 1.2. Provide a comprehensive summer program to accelerate students below proficient</p> <p>a. Offer 4-week Summer Learning Lab from June 5, 2022 - June 29, 2023;</p> <p>b. Utilize student performance pre- and post-standardized assessment</p> <p>c. Use ELPAC Scores and disaggregated Fountas and Pinnell and NWEA scores to individualize ELD instruction</p>	Yes	\$35,000.00	\$0
1.3	<p><b>CORE</b></p> <p>Action 1.3: Maintain accurate data</p> <p>a. Purchase student data and demographic warehouse platform.</p> <p>b. Provide training administration and front office on data entry, required Ed Code training and all civil rights requirements.</p> <p>b. Train teachers to conduct data entry, required Ed Code and all civil rights requirements;</p>	Yes	\$11,196.33	\$9,559
1.4	<b>CURRICULUM DESIGN AND PLANNING</b>	Yes	\$216,750.00	\$133,784

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures
	<p>1.4: Continue to strengthen alignment to Common Core ELA &amp; Math, English Language Development Standards and Next Generation science Standards (NGSS)</p> <p>a. Braid Waldorf methods with ELA EL-Education Units to build teacher-refined Waldorf-ELA EI-Education whole child focused intercultural ELA units;</p> <p>b. Braid Waldorf methods with Eureka Math (TK-5) and CPM Math (6-8) to build teacher-refined Waldorf whole-child focused culture-sustaining intercultural Math units;</p> <p>c. Braid Waldorf methods with FOSS Kits and Calculus Roundtable Lessons Units to build teacher-refined Waldorf- Science whole child focused culture-sustaining intercultural units;</p> <p>d. Support instructional coaching sessions through Instruction Partners and Waldorf Coach Team to assist staff in detailing and implementing of Waldorf inspired EI-Education v2 blocks and aligned Math, Science and Social Studies blocks that are culture-sustaining and developmentally appropriate engaging head heart and hand 2022-2023.</p>			
1.5	<p><b>PROFESSIONAL DEVELOPMENT AND COLLABORATION</b></p> <p>Action 1.5: Teachers are given a curriculum framework for the Common Core Standards, as well as the Next Generation Science Standards. The framework will help teachers to have a better understanding of the curriculum and standards for their specific grade level.</p> <p>a. Teachers have created Waldorf-inspired CCSS curricular blocks that have integrated and aligned ELA and the NGSS or the Social Studies State Standards. Teachers will also be refining these blocks to enhance learning.</p> <p>b. Throughout the year teachers will meet with in-house Assistant Head of School, other members of Instructional</p>	Yes	\$10,000.00	\$10,000

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures
	Leadership Team, Instruction Partners Coach and Waldorf Coach Team.			
1.6	<b>Staffing: Credentialed (Administration &amp; Instructional)</b> Salaries and benefits for the following credentialed staff members: <ul style="list-style-type: none"> <li>• Head of School</li> <li>• Dean of Student Culture</li> <li>• SPED Program Leadership</li> <li>• 2 SPED Teachers</li> <li>• 1 ERMHS Clinicians</li> <li>• 1 Counselor</li> <li>• Behavioral Intervention Specialist</li> <li>• Speech &amp; Language Pathologist</li> </ul>	Yes	\$1,032,683.04	\$882,416
1.7	<b>Staffing: Classified</b> Salaries and benefits for the following classified staff members: <ul style="list-style-type: none"> <li>• HR/Finance Staff</li> <li>• Office Manager</li> <li>• Multilingual Learners Intervention Specialist</li> <li>• Instructional Assistants</li> <li>• Behavioral Aides</li> <li>• Technology Coordinator</li> <li>• Food Service / Office Clerk</li> <li>• ELOP Coordinator</li> <li>• Development Manager3</li> </ul>	Yes	\$979,464.01	\$322,574

## Goal 2

### Goal Description

**Increase school/community connectedness by promoting a safe and welcoming school environment for all families and students so that all students are in their classes ready to learn on time.**

## Expected Annual Measurable Objectives

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
Chronic Absenteeism All Students	23.2% 2018-19	17.2% 2021-22		Current projects show that our chronic absenteeism for all students will be greater than our desired outcome.	9.5%
Chronic Absenteeism African American	37.3% 2018-19	20.0% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	9.3%
Chronic Absenteeism Asian	7.7% 2018-19	7.2% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	5.7%
Chronic Absenteeism English Learners	14.6% 2018-19	11.6% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	8.9%
Chronic Absenteeism Latino	20.2% 2018-19	14.2% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	9.0%
Chronic Absenteeism Two or More Races	33.3% 2018-19	20.0% 2021-22		Current projects show that we are on target to reach or exceed our desired outcome.	9.3%
Socioeconomically Disadvantaged	25.6% 2018-19	19.6% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	10.6%
Students with Disabilities	24.4% 2018-19	18.4% 2021-22		Current projects show that our chronic absenteeism for this demographic will be greater than our desired outcome.	10.7%

**Actions & Measuring and Reporting Results**

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures
2.1	<p><b>School Community Connectedness</b> CORE OR SUPPLEMENTAL Action 2.1:</p> <p>Maintain CSCE Attendance Policy Increase attendance to achieve 93% 2023-2024</p>	No		
2.2	<p><b>School Community Connecteness</b> CORE or Supplemental Action 2.2:</p> <p>Continue to work in partnership with Faith in Action East Bay (“FIAEB”) formerly Oakland Community Organizations, and Families in Action for Quality Schools, to build strong parent leadership and powerful volunteer culture in the school and community. Use surveys throughout the school year to determine effectiveness.</p>	No		
2.3	<p><b>SCHOOL COMMUNITY CONNECTEDNESS</b> CORE OR SUPPLEMENTAL Action 2.3:</p> <p>Work in partnership with Families in Action for Quality Schools and FIAEB to build strong parent engagement employing leadership summits and trainings, one to ones, sign-in sheets, surveys, press releases and publications.</p>	No Yes	\$2,520.00	\$2000
2.4	<p><b>SCHOOL COMMUNITY CONNECTEDNESS</b> CORE OR SUPPLEMENTAL  Action 2.4:</p>	No Yes		

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures
	<p>a. Implement, align to CSCE core Waldorf strategies and support school-wide Waldorf-Inspired MBSS (M-RTI-PBIS/Restorative Justice) behavior plan and linked culture-sustaining positive behavioral processes and intervention to meet the needs of students in danger of suspension;</p> <p>b. Measure progress through chronic absenteeism rates and CORE student surveys.</p>			
2.5	<p><b>SCHOOL COMMUNITY CONNECTEDNESS</b> Action 2.5</p> <p>a. Continue to support food safety and food dignity through Alameda County Food Bank Partnership for CSCE Mobile Food Pantry</p>	No	\$20,000.00	\$7,800
2.6	<p><b>CORE</b> Action 2.6 Utilize, strengthen and continue to document Waldorf strategies -</p> <p>a. Morning Whole School and Classroom Circle/Advisory b. Storytelling drawing from stories shared by families in Parents Families in Action gatherings around year round Stories &amp; Festival Design c. Main Lesson Book Design</p> <p>Utilize MTSS Pyramid Data Analysis to track student, and sub group growth.</p>	Yes	\$27,000.00	\$17,850
2.7	<p><b>INTERVENTION</b> Action 2.7</p>	Yes		

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures
	a. Utilize MTSS Pyramid Data Analysis to track student, and sub group growth.			

## Goal 3

### Goal Description

**Goal 3.1 Maintain a highly qualified teacher in every classroom;**

**Goal 3.2 Strengthen our outcome-based plan and regularly monitor its implementation;**

**Goal 3.3 Maintain all necessary instructional materials aligned to Common Core and our Waldorf inspired Standards-aligned program;**

**Goal 3.4 Maintain clean facilities.**

## Expected Annual Measurable Objectives

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24
Goal 3.1 Count of highly qualified Teachers	100% 2020-21	100% 2021-22		On track to achieve desired outcome.	100%
Goal 3.4 Norcal Cleaning Check Register Inventory	100% 2020-21	100% 2021-22		On track to achieve desired outcome.	100%
Goal 3.3 2022-23 Williams Act Monitoring Process	NA	High Ranking		High ranking achieved for 23-24.	High Ranking
Goal 3.2 2022-22 Instruction Partners CSCE Walk Through Observation Rubric Tool Focus Student Engagement	Rating of 2.5 on Instruction Partners CSCE Walk Through Observation Rubric Tool Focus Student Engagement - Scale 1-5	Rating of 3.5 on Instruction Partners CSCE Walk Through Observation Rubric Tool Focus Student Engagement - Scale 1-5		On track to achieve desired outcome.	Rating of 4.5 on Instruction Partners CSCE Walk Through Observation Rubric Tool Focus Student Engagement - Scale 1-5

**Actions & Measuring and Reporting Results**

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures
3.1	<p><b>TEACHING and LEARNING</b> CORE OR SUPPLEMENTAL Action 3.1</p> <p>Students receive instruction from teachers with appropriate State certification and licensure (following ESSA).</p>	No		
3.2	<p><b>Teaching and Learning</b> Action 3.2</p> <p>Through process of regular LCAP review, school will strengthen plan how to best support the academic needs of all students, with intensity for Economically Disadvantaged students English Learners, (see Goal 1), and monitor on a regular basis.</p>	Yes		
3.3	<p><b>CORE</b></p> <p>Action 3.3:</p> <p>Students receive required instructional materials.</p>	Yes	\$14,020.00	\$14,020
3.4	<p><b>Facilities</b> Action 3.4</p> <p>Facilities are clean, safe, and well-maintained (Williams Act).</p>	No	\$129,600.00	\$75,600



Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures

## Goal 4

Goal Description

## Expected Annual Measurable Objectives

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24

## Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures

## Goal 5

Goal Description

### Expected Annual Measurable Objectives

Metric	Baseline	Year 1 Outcome	Year 2 Outcome	Mid-Year Outcome Data	Desired Outcome for 2023-24

### Actions & Measuring and Reporting Results

Goal # Action #	Action Title and Description	Contributing	Total Funds Budgeted	Mid-Year Expenditures

# Coversheet

## Multiyear Budget Projection Presentation & Vote

**Section:** VI. Finance  
**Item:** A. Multiyear Budget Projection Presentation & Vote  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** CSCE Budget Scenario 1.pdf  
CSCE Budget Scenario 3.pdf  
CSCE Budget Scenario 2.pdf

## Budget Summary

**CSCE**  
**Budget Summary**  
**Four Year Budget, FY2223 through FY2526**



SACS (Code Description)		185 2023-24		200 2024-25		215 2025-26	
<b>Revenue</b>							
	State LCFF Revenue	2,342,964		2,544,409		2,801,359	
	Federal Revenue	545,604		228,773		240,021	
	Other State Revenue	1,369,867		1,243,914		1,085,462	
	Local Revenue	169,270		162,006		162,006	
<b>Total Revenue</b>		<b>\$ 4,427,705</b>		<b>\$ 4,179,102</b>		<b>\$ 4,288,848</b>	
<b>Expenses</b>							
1000	Certificated Salaries	1,495,984	29.7%	1,275,343	29.1%	1,275,343	28.8%
2000	Classified Salaries	679,191	13.5%	674,955	15.4%	674,955	15.2%
3000	Benefits	580,732	11.5%	519,670	11.8%	520,587	11.7%
	<b>Total Personnel Expense</b>	<b>2,755,907</b>	<b>54.6%</b>	<b>2,469,968</b>	<b>56.3%</b>	<b>2,470,884</b>	<b>55.8%</b>
4000	Books and Supplies	406,230	8.1%	355,488	8.1%	361,398	8.2%
5000	Services and Other Operating Expenses	1,882,862	37.3%	1,560,173	35.6%	1,599,724	36.1%
6000	Capital Outlay						
7000	Other Outgoing						
<b>Total Expenses</b>		<b>\$ 5,044,999</b>		<b>\$ 4,385,628</b>		<b>\$ 4,432,007</b>	
<b>Surplus / (Deficit)</b>		<b>\$ (617,294)</b>		<b>\$ (206,527)</b>		<b>\$ (143,158)</b>	
As a % of LCFF Revenue		-26%		-8%		-5%	
<b>Estimated Beginning Fund Balance (Net Assets)</b>		<b>2,094,936</b>		<b>1,477,642</b>		<b>1,271,116</b>	
<b>Ending Balance</b>		<b>\$ 1,477,642</b>		<b>\$ 1,271,116</b>		<b>\$ 1,127,957</b>	
As a % of LCFF Revenue		63%		50%		40%	

## Budget Summary

**CSCE**  
**Budget Summary**  
**Four Year Budget, FY2223 through FY2526**



SACS (Code Description)		185 2023-24		200 2024-25		215 2025-26	
<b>Revenue</b>							
	State LCFF Revenue	2,342,964		2,544,409		2,801,359	
	Federal Revenue	545,604		228,773		240,021	
	Other State Revenue	1,369,867		1,243,914		1,085,462	
	Local Revenue	169,270		162,006		162,006	
<b>Total Revenue</b>		<b>\$ 4,427,705</b>		<b>\$ 4,179,102</b>		<b>\$ 4,288,848</b>	
<b>Expenses</b>							
1000	Certificated Salaries	1,495,984	29.7%	1,200,114	28.8%	1,200,114	28.5%
2000	Classified Salaries	679,191	13.5%	562,376	13.5%	562,376	13.3%
3000	Benefits	580,732	11.5%	491,998	11.8%	492,873	11.7%
	<b>Total Personnel Expense</b>	<b>2,755,907</b>	<b>54.6%</b>	<b>2,254,489</b>	<b>54.1%</b>	<b>2,255,363</b>	<b>53.5%</b>
4000	Books and Supplies	406,230	8.1%	355,488	8.5%	361,398	8.6%
5000	Services and Other Operating Expenses	1,882,862	37.3%	1,560,173	37.4%	1,599,724	37.9%
6000	Capital Outlay						
7000	Other Outgoing						
<b>Total Expenses</b>		<b>\$ 5,044,999</b>		<b>\$ 4,170,149</b>		<b>\$ 4,216,485</b>	
<b>Surplus / (Deficit)</b>		<b>\$ (617,294)</b>		<b>\$ 8,953</b>		<b>\$ 72,363</b>	
As a % of LCFF Revenue		-26%		0%		3%	
<b>Estimated Beginning Fund Balance (Net Assets)</b>		<b>2,094,936</b>		<b>1,477,642</b>		<b>1,486,595</b>	
<b>Ending Balance</b>		<b>\$ 1,477,642</b>		<b>\$ 1,486,595</b>		<b>\$ 1,558,958</b>	
As a % of LCFF Revenue		63%		58%		56%	

## Budget Summary

**CSCE**  
**Budget Summary**  
**Four Year Budget, FY2223 through FY2526**



SACS (Code Description)		185 2023-24		200 2024-25		215 2025-26	
<b>Revenue</b>							
	State LCFF Revenue	2,342,964		2,544,409		2,801,359	
	Federal Revenue	545,604		228,773		240,021	
	Other State Revenue	1,369,867		1,243,914		1,085,462	
	Local Revenue	169,270		162,006		162,006	
<b>Total Revenue</b>		<b>\$ 4,427,705</b>		<b>\$ 4,179,102</b>		<b>\$ 4,288,848</b>	
<b>Expenses</b>							
1000	Certificated Salaries	1,495,984	29.7%	1,200,114	27.9%	1,200,114	27.6%
2000	Classified Salaries	679,191	13.5%	679,468	15.8%	679,468	15.6%
3000	Benefits	580,732	11.5%	503,261	11.7%	504,164	11.6%
	<b>Total Personnel Expense</b>	<b>2,755,907</b>	<b>54.6%</b>	<b>2,382,844</b>	<b>55.4%</b>	<b>2,383,746</b>	<b>54.9%</b>
4000	Books and Supplies	406,230	8.1%	355,488	8.3%	361,398	8.3%
5000	Services and Other Operating Expenses	1,882,862	37.3%	1,560,173	36.3%	1,599,724	36.8%
6000	Capital Outlay						
7000	Other Outgoing						
<b>Total Expenses</b>		<b>\$ 5,044,999</b>		<b>\$ 4,298,504</b>		<b>\$ 4,344,868</b>	
<b>Surplus / (Deficit)</b>		<b>\$ (617,294)</b>		<b>\$ (119,403)</b>		<b>\$ (56,020)</b>	
As a % of LCFF Revenue		-26%		-5%		-2%	
<b>Estimated Beginning Fund Balance (Net Assets)</b>		<b>2,094,936</b>		<b>1,477,642</b>		<b>1,358,240</b>	
<b>Ending Balance</b>		<b>\$ 1,477,642</b>		<b>\$ 1,358,240</b>		<b>\$ 1,302,220</b>	
As a % of LCFF Revenue		63%		53%		46%	

# Coversheet

## Form 700 Reminder

**Section:** VII. Governance  
**Item:** A. Form 700 Reminder  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** Form 700 Presentation Feb. Board Meeting.pdf  
Form\_700\_2023.pdf

# Form 700 Presentation - Due April 1, 2024

## 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.



# 2023-2024 Statement of Economic Interests



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## Form 700

A Public Document

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### **Helpful Resources**

- Video Tutorials
- Reference Pamphlet
- Excel Version
- FAQs
- Gift and Travel Fact Sheet for State and Local Officials

## **California Fair Political Practices Commission**

1102 Q Street, Suite 3050 • Sacramento, CA 95811

Email Advice: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

Toll-free advice line: 1 (866) ASK-FPPC • 1 (866) 275-3772

Telephone: (916) 322-5660 • Website: [www.fppc.ca.gov](http://www.fppc.ca.gov)

December 2023

## Quick Start Guide

Detailed instructions begin on page 3.

### WHEN IS THE ANNUAL STATEMENT DUE?

- March 1 – Elected State Officers, Judges and Court Commissioners, State Board and Commission members listed in Government Code Section 87200
- April 2 – Most other filers

### WHERE DO I FILE?

Most people file the Form 700 with their agency. If you're not sure where to file your Form 700, contact your filing officer or the person who asked you to complete it.

### ITEMS TO NOTE!

- The Form 700 is a public document.
- Only filers serving in active military duty may receive an extension on the filing deadline.
- You must also report interests held by your spouse or registered domestic partner.
- Your agency's conflict of interest code will help you to complete the Form 700. You are encouraged to get your conflict of interest code from the person who asked you to complete the Form 700.

### NOTHING TO REPORT?

Mark the "No reportable interests" box on Part 4 of the Cover Page, and submit only the signed Cover Page. Please review each schedule carefully!

Schedule	Common Reportable Interests	Common Non-Reportable Interests
A-1: Investments	Stocks, including those held in an IRA or 401K. Each stock must be listed.	Insurance policies, government bonds, diversified mutual funds, funds similar to diversified mutual funds.
A-2: Business Entities/Trusts	Business entities, sole proprietorships, partnerships, LLCs, corporations and trusts. (e.g., Form 1099 filers).	Savings and checking accounts, cryptocurrency, and annuities.
B: Real Property	Rental property in filer's jurisdiction, or within two miles of the boundaries of the jurisdiction.	A residence used exclusively as a personal residence (such as a home or vacation property).
C: Income	Non-governmental salaries. Note that filers are required to report only half of their spouse's or partner's salary.	Governmental salary (from school district, for example).
D: Gifts	Gifts from businesses, vendors, or other contractors (meals, tickets, etc.).	Gifts from family members.
E: Travel Payments	Travel payments from third parties (not your employer).	Travel paid by your government agency.

**Note:** Like reportable interests, non-reportable interests may also create conflicts of interest and could be grounds for disqualification from certain decisions.

### QUESTIONS?

- [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)
- (866) 275-3772 Mon-Thurs, 9-11:30 a.m.

### E-FILING ISSUES?

- If using your agency's system, please contact technical support at your agency.
- If using FPPC's e-filing system, write to [form700@fppc.ca.gov](mailto:form700@fppc.ca.gov).

## What's New

### Gift Limit Increase

The gift limit increased to **\$590** for calendar years **2023** and **2024**. The gift limit was \$520 for calendar years 2021 and 2022.

### Who must file:

- Elected and appointed officials and candidates listed in Government Code Section 87200
- Employees, appointed officials, and consultants filing pursuant to a conflict of interest code ("code filers"). **Obtain your disclosure categories, which describe the interests you must report, from your agency;** they are not part of the Form 700
- Candidates running for local elective offices that are designated in a conflict of interest code (e.g., county sheriffs, city clerks, school board trustees, and water board members)

#### Exception:

- Candidates for a county central committee are not required to file the Form 700
- Employees in newly created positions of existing agencies

For more information, see Reference Pamphlet, page 3, at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Where to file:

#### 87200 Filers

State offices	⇒	Your agency
Judicial offices	⇒	The clerk of your court
Retired Judges	⇒	Directly with FPPC
County offices	⇒	Your county filing official
City offices	⇒	Your city clerk
Multi-County offices	⇒	Your agency

#### Code Filers — State and Local Officials, Employees, and Consultants Designated in a Conflict of Interest

**Code:** File with your agency, board, or commission unless otherwise specified in your agency's code (e.g., Legislative staff files directly with FPPC). In most cases, the agency, board, or commission will retain the statements.

**Members of Newly Created Boards and Commissions:** File with your agency or with your agency's code reviewing body pursuant to Regulation 18754.

#### Employees in Newly Created Positions of Existing Agencies:

File with your agency or with your agency's code reviewing body. (See Reference Pamphlet, page 3.)

#### Candidates file as follow:

State offices, Judicial offices and multi-county offices	⇒	County elections official with whom you file your declaration of candidacy
County offices	⇒	County elections official
City offices	⇒	City Clerk
Public Employee's Retirement System (CalPERS)	⇒	CalPERS
State Teacher's Retirement Board (CalSTRS)	⇒	CalSTRS

### How to file:

The Form 700 is available at [www.fppc.ca.gov](http://www.fppc.ca.gov). Form 700 schedules are also available in Excel format. Each Statement 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. All statements are signed under the penalty of perjury and must be verified by the filer. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

### When to file:

#### Annual Statements

##### ⇒ March 1, 2024

- Elected State Officers
- Judges and Court Commissioners
- State Board and State Commission Members listed in Government Code Section 87200

##### ⇒ April 2, 2024

- Most other filers

Individuals filing under conflict of interest codes in city and county jurisdictions should verify the annual filing date with their filing official or filing officer.

Statements postmarked by the filing deadline are considered filed on time.

Statements of 30 pages or less may be emailed or faxed by the deadline as long as the originally signed paper version is sent by first class mail to the filing official within 24 hours.

#### Assuming Office and Leaving Office Statements

Most filers file within 30 days of assuming or leaving office or within 30 days of the effective date of a newly adopted or amended conflict of interest code.

#### Exception:

If you assumed office between October 1, 2023, and December 31, 2023, and filed an assuming office statement, you are not required to file an annual statement until March 1, 2025, or April 1, 2025, whichever is applicable. The annual statement will cover the day after you assumed office through December 31, 2024. (See Reference Pamphlet, page 6, for additional exceptions.)

#### Candidate Statements

File no later than the final filing date for the declaration of candidacy or nomination documents. A candidate statement is not required if you filed an assuming office or annual statement for the same jurisdiction within 60 days before filing a declaration of candidacy or other nomination documents.

#### Late Statements

**There is no provision for filing deadline extensions unless the filer is serving in active military duty. (See page 19 for information on penalties and fines.)**

#### Amendments

Statements may be amended at any time. You are only required to amend the schedule that needs to be revised. It is not necessary to amend the entire filed form. The amended schedule(s) is attached to your original filed statement. Obtain amendment schedules at [www.fppc.ca.gov](http://www.fppc.ca.gov).

## Types of Statements

### Assuming Office Statement:

If you are a newly appointed official or are newly employed in a position designated, or that will be designated, in a state or local agency's conflict of interest code, your assuming office date is the date you were sworn in or otherwise authorized to serve in the position. If you are a newly elected official, your assuming office date is the date you were sworn in.

- Report: Investments, interests in real property, and business positions held on the date you assumed the office or position must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date you assumed the office or position.

For positions subject to confirmation by the State Senate or the Commission on Judicial Appointments, your assuming office date is the date you were appointed or nominated to the position.

- Example: Maria Lopez was nominated by the Governor to serve on a state agency board that is subject to state Senate confirmation. The assuming office date is the date Maria's nomination is submitted to the Senate. Maria must report investments, interests in real property, and business positions Maria holds on that date, and income (including loans, gifts, and travel payments) received during the 12 months prior to that date.

If your office or position has been added to a newly adopted or newly amended conflict of interest code, use the effective date of the code or amendment, whichever is applicable.

- Report: Investments, interests in real property, and business positions held on the effective date of the code or amendment must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the effective date of the code or amendment.

### Annual Statement:

Generally, the period covered is January 1, 2023, through December 31, 2023. If the period covered by the statement is different than January 1, 2023, through December 31, 2023, (for example, you assumed office between October 1, 2022, and December 31, 2022 or you are combining statements), you must specify the period covered.

- Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement must be reported. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

- If your disclosure category changes during a reporting period, disclose under the old category until the effective date of the conflict of interest code amendment and disclose under the new disclosure category through the end of the reporting period.

### Leaving Office Statement:

Generally, the period covered is January 1, 2023, through the date you stopped performing the duties of your position. If the period covered differs from January 1, 2023, through the date you stopped performing the duties of your position (for example, you assumed office between October 1, 2022, and December 31, 2022, or you are combining statements), the period covered must be specified. The reporting period can cover parts of two calendar years.

- Report: Investments, interests in real property, business positions held, and income (including loans, gifts, and travel payments) received during the period covered by the statement. Do not change the preprinted dates on Schedules A-1, A-2, and B unless you are required to report the acquisition or disposition of an interest that did not occur in 2023.

### Candidate Statement:

If you are filing a statement in connection with your candidacy for state or local office, investments, interests in real property, and business positions held on the date of filing your declaration of candidacy must be reported. In addition, income (including loans, gifts, and travel payments) received during the 12 months prior to the date of filing your declaration of candidacy is reportable. Do not change the preprinted dates on Schedules A-1, A-2, and B.

Candidates running for local elective offices (e.g., county sheriffs, city clerks, school board trustees, or water district board members) must file candidate statements, as required by the conflict of interest code for the elected position. The code may be obtained from the agency of the elected position.

### Amendments:

If you discover errors or omissions on any statement, file an amendment as soon as possible. You are only required to amend the schedule that needs to be revised; it is not necessary to refile the entire form. Obtain amendment schedules from the FPPC website at [www.fppc.ca.gov](http://www.fppc.ca.gov).

**Note:** Once you file your statement, you may not withdraw it. All changes must be noted on amendment schedules.

### Expanded Statement:

If you hold multiple positions subject to reporting requirements, you may be able to file an expanded statement for each position, rather than a separate and distinct statement for each position. The expanded statement must cover all reportable interests for all jurisdictions and list all positions on the Form 700 or on an attachment for which it is filed. The rules and processes governing the filing of an expanded statement are set forth in Regulation 18723.1.



**STATEMENT OF ECONOMIC INTERESTS  
COVER PAGE  
A PUBLIC DOCUMENT**

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 (Statewide Jurisdiction)  
 Multi-County County of  
 City of Other

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

**Annual:** The period covered is January 1, 2023, through December 31, 2023. **Leaving Office:** Date Left (Check one circle.)  
 -or- The period covered is through December 31, 2023. The period covered is January 1, 2023, 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 - Investments – schedule attached
- Schedule A-2 - Investments – schedule attached
- Schedule B - Real Property – schedule attached
- Schedule C - Income, Loans, & Business Positions – schedule attached
- Schedule D - Income – Gifts – schedule attached
- Schedule E - Income – Gifts – Travel Payments – schedule attached

-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 EMAIL 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 (month, day, year)

Signature (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 separate and distinct statements with each agency. To simplify your filing obligations, in some cases you may instead complete a single expanded statement and file it with each agency.
  - 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 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.

<b>1. Office, Agency, or Court</b>	
Agency Name (Do not use acronyms)	
Feather River Irrigation District	
Division, Board, Department, District, if applicable	Your Position
N/A	Board Member
▶ If filing for multiple positions, list below or on an attachment. (Do not use acronyms)	
Agency: N/A	Position:
<b>2. Jurisdiction of Office (Check at least one box)</b>	
<input type="checkbox"/> State	<input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction)
<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 2023 annual statement, **do not** change the pre-printed dates to reflect 2024. Your annual statement is used for reporting the **previous year's** economic interests. Economic interests for your annual filing covering January 1, 2024, through December 31, 2024, will be disclosed on your statement filed in 2025. See Reference Pamphlet, page 4.

Combining Statements: Certain types of statements for the same position 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. Each statement must have an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) All statements must be signed under penalty of perjury and be verified by the filer pursuant to Government Code Section 81004. See Regulation 18723.1(c) for filing instructions for copies of expanded statements.

**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.

# 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.

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name

▶ 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:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
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:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
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:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
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:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
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:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
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:

\_\_\_\_\_/\_\_\_\_\_/23      \_\_\_\_\_/\_\_\_\_\_/23  
ACQUIRED                  DISPOSED

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 had 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 16, 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.) (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)

### 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.

- 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. Do not use acronyms for the name of the business entity, unless it is one that is commonly understood by the public.
- 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 20 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. Frank’s conflict of interest code requires full disclosure of investments. Frank must disclose 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 Frank’s spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. Alice 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.



# SCHEDULE A-2

## Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (Business Address Acceptable) \_\_\_\_\_

Check one  
 Trust, go to 2       Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

---

<b>FAIR MARKET VALUE</b>	<b>IF APPLICABLE, LIST DATE:</b>			
\$0 - \$1,999		___/___/23	___/___/23	
\$2,000 - \$10,000		ACQUIRED	DISPOSED	
\$10,001 - \$100,000				
\$100,001 - \$1,000,000				
Over \$1,000,000				

**NATURE OF INVESTMENT**  
 Partnership     Sole Proprietorship    \_\_\_\_\_ Other

**YOUR BUSINESS POSITION** \_\_\_\_\_

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (Business Address Acceptable) \_\_\_\_\_

Check one  
 Trust, go to 2       Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

---

<b>FAIR MARKET VALUE</b>	<b>IF APPLICABLE, LIST DATE:</b>			
\$0 - \$1,999		___/___/23	___/___/23	
\$2,000 - \$10,000		ACQUIRED	DISPOSED	
\$10,001 - \$100,000				
\$100,001 - \$1,000,000				
Over \$1,000,000				

**NATURE OF INVESTMENT**  
 Partnership     Sole Proprietorship    \_\_\_\_\_ Other

**YOUR BUSINESS POSITION** \_\_\_\_\_

**▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

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

**▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

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

**▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

None    or    Names listed below \_\_\_\_\_

**▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

None    or    Names listed below \_\_\_\_\_

**▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:  
 INVESTMENT       REAL PROPERTY

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property \_\_\_\_\_

Description of Business Activity or City or Other Precise Location of Real Property \_\_\_\_\_

<b>FAIR MARKET VALUE</b>	<b>IF APPLICABLE, LIST DATE:</b>			
\$2,000 - \$10,000		___/___/23	___/___/23	
\$10,001 - \$100,000		ACQUIRED	DISPOSED	
\$100,001 - \$1,000,000				
Over \$1,000,000				

**NATURE OF INTEREST**  
 Property Ownership/Deed of Trust       Stock       Partnership

Leasehold \_\_\_\_\_ Other \_\_\_\_\_  
Yrs. remaining

Check box if additional schedules reporting investments or real property are attached

**▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:  
 INVESTMENT       REAL PROPERTY

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property \_\_\_\_\_

Description of Business Activity or City or Other Precise Location of Real Property \_\_\_\_\_

<b>FAIR MARKET VALUE</b>	<b>IF APPLICABLE, LIST DATE:</b>			
\$2,000 - \$10,000		___/___/23	___/___/23	
\$10,001 - \$100,000		ACQUIRED	DISPOSED	
\$100,001 - \$1,000,000				
Over \$1,000,000				

**NATURE OF INTEREST**  
 Property Ownership/Deed of Trust       Stock       Partnership

Leasehold \_\_\_\_\_ Other \_\_\_\_\_  
Yrs. remaining

Check box if additional schedules reporting investments or real property are attached

**Comments:** \_\_\_\_\_

## 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.)

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.

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

## 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			
\$10,001 - \$100,000	____/____/23	____/____/23	
\$100,001 - \$1,000,000	ACQUIRED	DISPOSED	
Over \$1,000,000			

NATURE OF INTEREST

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

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			
\$10,001 - \$100,000	____/____/23	____/____/23	
\$100,001 - \$1,000,000	ACQUIRED	DISPOSED	
Over \$1,000,000			

NATURE OF INTEREST

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

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 \_\_\_\_\_

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 \_\_\_\_\_

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.)
  - **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 first and last 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, Allison received rental income of \$12,000, from a single tenant who rented property 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
IF RENTAL PROPERTY, GROSS INCOME PERIOD	
<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$500 - \$1,000
<input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$1,001 - \$10,000
<input checked="" type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> 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.	
<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)

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

▶ 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>	

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

**Comments:** \_\_\_\_\_

## 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.) 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.)
- 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 12.)

#### 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.



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 FAIR POLITICAL PRACTICES COMMISSION  
 Name \_\_\_\_\_

## 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)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ 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)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

**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.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

### Reminders

- Gifts from a single source are subject to a \$590 limit in 2023. (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.



**CALIFORNIA FORM 700**  
 FAIR POLITICAL PRACTICES COMMISSION

Name \_\_\_\_\_

## 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 \_\_\_\_\_

▶ 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 \_\_\_\_\_

**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 nonprofit 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 \$500 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, the **date(s)** received, and 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 MaryClaire's 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 they are not providing services are likely considered gifts.

▶ 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 _____	

Note that the same payment from a 501(c)(3) would NOT be reportable.

### 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 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.

▶ 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>	

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](http://www.fppc.ca.gov).)

## Restrictions and Prohibitions

The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees to publicly disclose their economic interests including personal assets and income. The Act's conflict of interest provisions also disqualify a public official from taking part in a governmental decision if it is reasonably foreseeable that the decision will have a material financial effect on these economic interests as well as the official's personal finances and those of immediate family. (Gov. Code Sections 87100 and 87103.) The Fair Political Practices Commission (FPPC) is the state agency responsible for issuing the attached Statement of Economic Interests, Form 700, and for interpreting the Act's provisions.

### Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2023-2024, the gift limit increased to \$590 from a single source during a calendar year.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 10.

State and local officials and employees should check with their agency to determine if other restrictions apply.

### Disqualification

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions that will affect their economic interests. This may include interests they are not required to disclose. For example, a personal residence is often not reportable, but may be grounds for disqualification. Specific disqualification requirements apply to 87200 filers (e.g., city councilmembers, members of boards of supervisors, planning commissioners, etc.). These officials must publicly identify the economic interest that creates a conflict of interest and leave the room before a discussion or vote takes place at a public meeting. For more information, consult Government Code Section 87105, Regulation 18707, and the Guide to Recognizing Conflicts of Interest page at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

### Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

### Post-Governmental Employment

There are restrictions on representing clients or employers before former agencies. The provisions apply to elected state officials, most state employees, local elected officials, county chief administrative officers, city managers, including the chief administrator of a city, and general managers or chief administrators of local special districts and JPAs. The FPPC website has fact sheets explaining the provisions.

### Late Filing

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine of up to \$5,000 per violation may be imposed.

**For assistance** concerning reporting, prohibitions, and restrictions under the Act:

- Email questions to [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov).
- Call the FPPC toll-free at (866) 275-3772.

### Form 700 is a Public Document Public Access Must Be Provided

Statements of Economic Interests are public documents. The filing officer must permit any member of the public to inspect and receive a copy of any statement.

- Statements must be available as soon as possible during the agency's regular business hours, but in any event not later than the second business day after the statement is received. Access to the Form 700 is not subject to the Public Records Act procedures.
- No conditions may be placed on persons seeking access to the forms.
- No information or identification may be required from persons seeking access.
- Reproduction fees of no more than 10 cents per page may be charged.

## Questions and Answers

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### General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

On a candidate statement, disclose all reportable investments, interests in real property, and business positions held on the date you file your declaration of candidacy. You must also disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you file your declaration of candidacy.

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.

- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as “acting,” “interim,” or “alternate” must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse’s income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse’s economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse’s income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

### Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of “doing business in the jurisdiction” is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

## Questions and Answers Continued

- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

### Income Disclosure

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at [www.fppc.ca.gov](http://www.fppc.ca.gov). (See Reference Pamphlet, page 14.)



## Questions and Answers Continued

Q. I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?

A. Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the "comments" section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.

Q. I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)

Q. My spouse is a partner in a four-person firm where all of their business is based on their own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?

A. If your spouse's investment in the firm is 10% or greater, disclose 100% of your spouse's share of the business on Schedule A-2, Part 1 and 50% of your spouse's income on Schedule A-2, Parts 2 and 3. For example, a client of your spouse's must be a source of at least \$20,000 during the reporting period before the client's name is reported.

Q. How do I disclose my spouse's or registered domestic partner's salary?

A. Report the name of the employer as a source of income on Schedule C.

Q. I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)

Q. I received a loan from my grandfather to purchase my home. Is this loan reportable?

A. No. Loans received from family members are not reportable.

Q. Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?

A. No. Payments received on a loan made to a family member are not reportable.

### Real Property Disclosure

Q. During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency's jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an "acquired" date?

A. No, you are not required to show an "acquired" date because you previously owned the property. However, you may want to note in the "comments" section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.

Q. I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?

A. Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.

Q. Must I report a home that I own as a personal residence for my daughter?

A. You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.

Q. I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend's property as an interest in real property on my Form 700?

A. No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.

## Questions and Answers Continued

### Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2023 the gift limit was \$590, so the Bensons may have given the supervisor artwork valued at no more than \$1,080. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.

# Coversheet

## Comprehensive Safety Plan Update

**Section:** VII. Governance  
**Item:** B. Comprehensive Safety Plan Update  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** CSCE Comprehensive School Safety Plan for FY 2023-24.docx





**Comprehensive School Safety Plan:**

**Site Health and Safety Plan &**

**Emergency Plan for Faculty and**

**Staff 2023-2024**

**For**

**Community School for Creative Education Charter School**

Community School for Creative Education

Alameda County Office of Education

2111 International Boulevard  
Oakland CA 94606

510 686 4131

[info@communityschoolforcreativeeducation.org](mailto:info@communityschoolforcreativeeducation.org)

## 1.0 WHAT IS A SAFE SCHOOL?

"Safe schools are orderly and purposeful places where students and staff are free to learn and teach without the threat of physical and psychological harm. They are characterized by sensitivity and respect for all individuals, an environment of non-violence, clear behavioral expectations, disciplinary policies that are consistently and fairly administered, students' affiliation and bonding to the school, support and recognition for positive behavior, and a sense of community on the school campus. Safe schools also are characterized by proactive security procedures, established emergency response plans, timely maintenance, cleanliness, and a nice appearance of the campus and classrooms."

Taken from "Safe Schools: A Planning Guide for Action" California State Department of Education

### 1.1 Health and Safety Procedures.

**1.1.1 Governing Law:** The procedures that the school will follow to ensure the health and safety of pupils and staff. These procedures shall include the requirement that each employee of the school furnish the school with a criminal record summary as described in Section 44237.

*California Education Code Section 47605.6(b)(5)(G)*

**1.1.2 Procedures for Background Checks:** Employees and contractors of the School will be required to submit to a criminal background check and furnish a criminal record summary as required by Education Code Section 44237 and 45125.1. New employees not possessing a valid California Teaching Credential must submit two sets of fingerprints to the California Department of Justice for the purpose of obtaining a criminal record summary. The Head of School and Human Resources staff shall monitor compliance with this policy. Individuals who will volunteer at the School outside of the direct supervision of a credentialed employee shall be fingerprinted and receive background clearance prior to volunteering.

**1.1.3 Role of Staff as Mandated Child Abuse Reporters:** All non-certificated and certificated staff will be mandated child abuse reporters and will follow all applicable reporting laws and the same policies and procedures used by ACOE.

**1.1.4 TB Risk Assessment and Examination:** All School staff will be assessed and examined (if necessary) for tuberculosis prior to commencing employment and working with students as required by Education Code Section 49406.

**1.1.5 Immunizations:** All students enrolled and staff will be required to provide records documenting immunizations as is required at public schools pursuant to Health and Safety Code Section 120325-120375, and Title 17, California Code of Regulations Section 6000-6075. All rising 7<sup>th</sup> grade students must be immunized with a pertussis (whooping cough) vaccine booster.

**1.1.6 Medication in School:** The School will adhere to Education Code Section 49423 regarding administration of medication in school.

**1.1.7 Vision, Hearing, Scoliosis:** Students will be screened for vision, hearing and scoliosis: The School will adhere to Education Code Section 49450, et seq., as applicable to the grade levels served by the school.

**1.1.8 Blood-borne Pathogens:** The School shall meet state and federal standards for dealing with blood borne pathogens and other potentially infectious materials in the workplace. The School has a written infectious control plan designed to protect employees and students from possible infection due to contact with blood borne viruses, including human immunodeficiency virus ("HIV") and hepatitis B virus ("HBV"). Whenever exposed to blood or other bodily fluids through injury or accident, staff and students shall follow the latest medical protocol for disinfecting procedures.

**1.1.9 Drug-Free / Alcohol-Free / Smoke-Free Environment:** The School shall be a drug-, alcohol- and smoke-free environment.

**1.1.10 Comprehensive Anti-Discrimination and Harassment Policies and Procedures:** The School is committed to providing a school that is free from discrimination and sexual harassment, as well as any harassment based upon such factors as race, religion, creed, color, national origin, ancestry, age, medical condition, marital status, sexual orientation, or disability. The School has developed a comprehensive policy to prevent and immediately remediate any concerns about sexual discrimination or harassment at the Charter School (including employee to employee, employee to student, and student to

employee misconduct). Misconduct of this nature is very serious and will be addressed in accordance with the School's Anti-Discrimination and Anti-Harassment policy.

## **2.0 COMPREHENSIVE SCHOOL SAFETY PLAN.**

The School shall adhere to a Comprehensive School Safety Plan drafted specifically to the needs of the school site in conjunction with law enforcement and the Fire Marshall. This handbook shall include, but not be limited to the following responses: e.g. earthquakes, floods, shootings, and electricity loss.

**2.1 Facility Safety:** The School shall comply with Education Code Section 47610 by either utilizing facilities that are compliant with the Field Act or facilities that are compliant with the State Building Code. The School agrees to test sprinkler systems, fire extinguishers, and fire alarms annually at its facilities to ensure that they are maintained in an operable condition at all times. The School shall conduct fire drills at least annually.

**2.2 Emergency and Disaster Preparedness Plan:** Preventive efforts are in place to prevent problems before they occur. Education of staff and students is critical to ensure a smooth, uncomplicated action plan should a real emergency situation occur during school hours. Therefore, the following plans are in place:

**2.2.1** Emergency procedures\* are provided to all staff

**2.2.2** Evacuation maps are posted in all rooms

**2.2.3** Evacuation drills are held monthly and include faculty, staff, and students

\*Specific procedures are defined for the following emergencies: fire, explosion or threat of explosion, earthquake, fallen aircraft, bomb threat, chemical spill, severe windstorm, flood, and intrusion.

The administrator or assistant administrator coordinates disaster procedures.

The disaster plan will be reviewed and updated annually under the coordination of the administrator with input from the Fire Department and the Faculty.

**2.3 Emergency Information Staff Responsibilities:** Command Post will be located in the Main Office. If not accessible, the Command Post will be located in front of the main entrance (outside).

**2.3.1** *School Operations and Logistics Team chaired by Head of School*

**2.3.2** 1.1.1 Crisis Response Team:

**2.3.3 (i) Command and Control: Head of School or designee**

**2.3.4 (ii) Communications: Head of School or designee**

**2.3.5 (iii) Public Information: Head of School or designee**

**2.3.6 (iv) Search and Rescue: Assistant Head of School or designee**

**2.3.7 (v) Counseling: School Counselors**

**2.3.8 (vi) Damage Assessment: Head of School of Finance & Operations**

**2.3.9 (vii) Safety & Security: Office Manager**

**2.3.10 Command Post Runners:** Instructional Assistants, on site.

**2.4 First Aid/CPR:** (As needed) Class teachers

**2.5 Turn off Gas, Water and Electricity** Head of School of Finance & Operations

**2.6 Locators** 2 assigned staff members (class aides, or available teachers, special ed teacher)

**2.7 Traffic Controllers:** Classroom Aides

**2.8 Student Release:** Office Manager and 2 assigned team members

**2.9 STAFF RESPONSIBILITIES DEFINED.**

*To be revised annually*

**2.10 Crisis Plan Coordinators:** Develop, implement, and continue to assess the school crisis plan.

**2.11 Crisis Response Team:** Coordinate efforts of all staff in a crisis drill or actual event.

**2.12 Command Post Runners:** Report to Command Post and be prepared to record and deliver crisis information throughout the school site.

**2.13 First Aid/CPR:** May need to administer First aid/CPR during or following an emergency.

**2.14 Turn off Gas, Water, and Electricity:** Have tools and knowledge to shut off the utilities if necessary.

**2.15 Locators:** Report to Command Post and be prepared to locate staff/students as needed.

**2.16 Traffic Controllers:** After reporting to Command Post, report to designated area to control the incoming/outgoing emergency vehicles and other vehicles.

**2.17 Student Release:** After reporting to Command Post, be prepared to follow guidelines for the safe release of students to their parent/guardian.

**2.18 Public Information:** After reporting to Command Post, supervise the room where media will be expected to stay. Report NO information to media personnel until instructed by Crisis Coordinators.

**2.19 Cellular Phones and Battery-Operated Radios:** In the event of an emergency, keep cellular phone / battery-operated radios with you until instructed otherwise by Crisis Coordinators.

### **3.0 CHEMICAL SPILL.**

Students and staff should be familiar with these procedures in the event of an actual chemical spill. Notification of an actual chemical spill would be made in person or via loudspeaker.

#### **3.1 IF INSIDE:**

**3.1.1** Stay inside the room.

**3.1.2** Shut all doors and windows.

**3.1.3** Turn off heat or air conditioning.

**3.1.4** Await further instructions.\*

#### **3.2 IF OUTSIDE:**

**3.2.1** Students should return to their class quickly and quietly.

(i) (If recess, this class should be the homeroom.)

(ii) (If classroom is across campus, go inside the nearest classroom.)

**3.2.2** Staff members go inside their classrooms & follow inside procedures.

**3.2.3** Keep phone lines free.

**3.2.4** Await further instructions. \*

*\*Further instructions would be directed by phone or loudspeaker.*

#### **4.0 INTRUSION DRILL/LOCK DOWN:**

(Intrusion bell signal is **three (3) sets of three (3) rings or a verbal all call/loudspeaker message stating 'lock-down'**)

##### **4.1 IF AN INTRUSION BELL SOUNDS AND YOU ARE INSIDE:**

**4.1.1** Teachers immediately lock their classroom doors.

**4.1.2** Close windows / blinds.

**4.1.3** Turn off any equipment and lights.

**4.1.4** To the maximum extent possible, students and teachers gather in classroom where they cannot be seen by any intruder.

**4.1.5** Everyone face away from windows.

**4.1.6** REMAIN CALM.

**4.1.7** DO NOT USE THE PHONE; OFFICE STAFF MAY BE TRYING TO REACH YOU.

**4.1.8** Hold this position until "all clear" bell rings (one long, continuous bell).

**4.1.9** Teachers bring students & emergency folders to designated location on field.

**4.1.10** Indicate status of class with red/green folder.

**4.1.11** Await further instructions (dismissal).

**4.1.12** INSTRUCT STUDENTS THAT IF THEY HEAR AN INTRUSION SIGNAL AND THEY ARE NOT IN THE CLASSROOM THEY SHOULD:

**4.1.13** Enter the nearest classroom or office.

**4.1.14** To the maximum extent possible, students and teachers gather in classroom where they cannot be seen by any intruder.

**4.1.15** Everyone face away from windows.

**4.1.16** REMAIN CALM.

**4.1.17** Remain there until school staff directs them otherwise or "all clear" bell rings.

**4.1.18** If possible, students are found and escorted to designated location near office.

##### **5.0 FIRE DRILL.**

**5.1** When a fire alarm is sounded, all students and staff safely exit the campus classrooms.

**5.2** Classroom evacuation should occur quickly and quietly.

**5.3** Teachers will take the following appropriate action to evacuate all students.

**5.4** Teachers bring student list.

**5.4.1** Announce that no student is to return to a room unless directed.

**5.4.2** Turn off all lights and close classroom door.

**5.4.3** Walk students single file, quietly to designated location on field/open space.

**5.4.4** Be prepared to encounter emergency vehicles on roadway.

**5.4.5** Make sure that all students are present.

**5.4.6** Remain in designated area until all-clear bell is sounded. If ground is dry and delay occurs, have students sit quietly until all-clear bell is sounded.

## **6.0 EXPLOSION OR THREAT OF EXPLOSION.**

### **6.1 Explosion:**

**6.1.1** 911.

**6.1.2** Give DROP AND COVER command (See below).

**6.1.3** Sound school fire alarm.

**6.1.4** Evacuate to outdoor rally point.

**6.1.5** Take roll.

**6.1.6** Secure access roads for emergency vehicles.

**6.1.7** Keep students at a safe distance from the school buildings and firefighting equipment.

**6.1.8** Head of School - notify District Office/County Office of Education, as needed.

**6.1.9** Head of School - determine if Student Release or Site Evacuation should be implemented.

**6.1.10** Fire Department will determine when the school is safe for re-entry.

### **6.2 Threat of Explosion:** (See also Bomb Threat below)

***Follow procedure above.***

## **7.0 EARTHQUAKE DRILL.**

When an earthquake occurs, the following procedure will be followed:

### **7.1 IF INSIDE:**

**7.1.1** Move away from windows, shelves, heavy objects, or furniture that may fall. Take cover under a table or desk.

**7.1.2** Assume the DROP AND COVER posture: Head low, near knees, hands covering back of head & neck.

**7.1.3** Remain in DROP AND COVER posture until shaking has ceased, then prepare to evacuate.

**7.1.4** Classroom evacuation should occur quickly, and quietly.

**7.1.5** Designated school official should turn off gas at main connection and, if water pipes are ruptured, turn off main water connection.

**7.1.6** Teachers will take the following appropriate action to evacuate all students:

- (i) Teachers bring class list.
- (ii) Announce that no student is to return to a room unless directed.
- (iii) Turn off all lights and close classroom door.

- (iv) Walk students single file, quietly to designated location on field/open space.
- (v) Be prepared to encounter emergency vehicles on roadway.
- (vi) Make sure that all students are present.
- (vii) Remain in designated area until all-clear bell is sounded. If ground is dry and delay occurs, have students sit quietly until all-clear bell is sounded.

## **7.2 IF OUTSIDE DURING AN EARTHQUAKE:**

**7.2.1** Students should move away from buildings and assume DROP AND COVER posture.

**7.2.2** Follow the directions of nearest adult.

**7.2.3** When shaking has ceased, all students report to designate area for his or her class.

## **8.0 FALLEN AIRCRAFT.**

**8.1** Administrator will determine what action should be taken.

**8.2** When necessary, teachers and staff will take immediate action for the safety of students without waiting for directions from the Head of School.

**8.3** Activate 911 emergency services.

**8.4** Maintain a safe distance, allowing for possible explosion.

## **9.0 BOMB THREAT.**

**9.1 Stop use of all walkie-talkies.**

**9.1.1** Telephone Operator

**9.1.2** Listen - DO NOT interrupt caller. Take notes if possible.

**9.1.3** If possible, alert supervisor by a pre-arranged signal (Turn your phone upside down) while the caller is on the line.

**9.1.4** Complete Bomb Checklist.

**9.1.5** Notify supervisor, site administrator, and/or Head of School immediately after completing the call.

**9.2 Head of School.**

**9.2.1** Determine if school should be evacuated.

**9.2.2** Activate 911 emergency services.

**9.2.3** Notify District Office/County Office of education, as needed.

## **10.0 SEVERE WINDSTORM.**

**10.1 Prior Warning:** Administrator determines if Student Release should be implemented.

**10.2 No Warning:**

**10.2.1** Give DROP AND COVER command.

**10.2.2** Close windows and blinds.

**10.2.3** Remain near an inside wall.

**10.2.4** Avoid auditoriums, gymnasiums and other structures with large roof spans.

**10.2.5** Evacuate classrooms bearing full force of wind to safe area.

**11.0 FLOOD**

Depending on the method of warning and estimated time before flooding arrives; the Administrator may initiate any of the following procedures:

**11.1** Evacuate school buildings.

**11.2** Evacuate school site.

**11.3** Student release

**12.0 OPIOD OVERDOSE**

**12.1** Alert the Head of School

**12.2** Call 911

**12.3** Evacuate students to another room or outdoor space depending on the location of the overdose if there are students around.

**12.4** Initiate approved overdose safety protocol to ensure the student's safety based on state mandated training.



## Handout 1

Dear Staff,

There will be a fire drill today at \_\_\_\_\_. Please forewarn your students that this is a drill, or practice, in order to learn the right thing to do in case of a real emergency.

The fire alarm is unmistakable and loud. The all clear will be an administrator speaking directly to each teacher. All clear means it is safe to return to your room and the drill is over.

Things to remember:

- 12.4.1 Take a class roster with you.
- 12.4.2 Turn off the lights.
- 12.4.3 Close the door behind you.
- 12.4.4 Line your students up on the blacktop in designated areas.
- 12.4.5 Take roll to assure all students are with you.
- 12.4.6 Indicate to administrator if all students are with you.
- 12.4.7 Notify the administrator  
immediately if you have a student missing.  
Please read the following to your students.

Students, we are going to have a fire drill this afternoon. The rules are: No talking, so that you can hear teacher directions. Wait for the all-clear word from the person in charge to return to class.

- 12.4.8 If students start to talk, please remind them to be silent.
- 12.4.9 Walk - do not run. We need to stay calm and orderly.

**APPENDIX 13****HEALTH AND SAFETY PLAN****EMERGENCY DRILL PREPARATION FOR FACULTY AND STAFF****Prepare yourself *before* the drill**

- Check that the School Emergency Evacuation Route map is posted in your room\_ On it are 2 possible evacuation routes marked in color **If** you do not have a copy, please obtain one from the school office.
- Check that the contents of your Emergency Go-Bag is accessible and prominently located in your classroom using the Emergency Go-Bag & Notebook Checklist The Emergency Folder contains emergency instructions, a class list with emergency contacts, a list of students on any medication, and local emergency numbers.
- Classroom teachers may consider keeping a blanket, supply of bottled water, non-perishable food or snacks and other supplies in your room in the event an emergency requires a sustained lock-down.
- Confirm whether you will have any special duties. Get to know your buddies in neighboring classes.
- Check that you know the location of your fire extinguisher and recall the acronym to remind you how to use it: P.A.S.S. Pull the pin, aim at the base of the fire, squeeze the nozzle and sweep at the base of the fire.
- It is highly recommended that you complete your own Family Disaster Plan at home and your plan with your own childcare providers\_
- Plan a quiet activity that students can do in the assembly area in the event of a real emergency or a drill.
- California Government Code, Chapter 8, Section 3100 states:" .....all public employees are hereby declared to be disaster service workers subject to disaster service activities as may be assigned to them by their superiors or by law." With this in mind, please prepare yourself at home and at work in the event you are required to stay longer than your scheduled day. The Head of School or designee will release staff members as the needs change.
- If you have very extenuating circumstances discuss these with your Head of School NOW, not during an emergency.
- IF YOUR NAME DOES NOT APPEAR ON OUR EMERGENCY ORGANIZATION PLAN OR IF YOU DO NOT HAVE A CLASS, PLEASE REPORT TO THE EVACUATION AREA ON LARGE YARD.. DO NOT LEAVE THE CAMPUS!

**Prepare your students**

- Encourage your students to take this drill very seriously.
- Practice a "Drop, Cover, and Hold On" drill, having students hold their position for 45 seconds. You may count together: one-one hundred, two one-hundred etc.
- Drop down to knees and make yourselves small.
- Cover your face, head and neck, closing your eyes\_ Keep your body under or below level of desk/table/chairs, with your back to windows.
- If outside, get clear of buildings, power lines, trees, light poles and other dangers, drop down to your knees and cover your head and neck.