



Sage Oak Charter Schools

Board of Directors Study Session

Published on August 2, 2024 at 3:39 PM PDT

Date and Time

Thursday August 8, 2024 at 10:15 AM PDT

Location

Sage Oak Charter Schools

1473 Ford Street, Suite #105
Redlands, CA 92373

Regus- Gateway Chula Vista

333 H Street, Suite 5000
Chula Vista, CA 91910

[Join Zoom Meeting](#)

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[\(US\) +1 669-900-6833](#)

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MISSION STATEMENT

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

THE ORDER OF BUSINESS MAY BE CHANGED WITHOUT NOTICE

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

REASONABLE LIMITATIONS MAY BE PLACED ON PUBLIC TESTIMONY

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

REASONABLE ACCOMMODATION WILL BE PROVIDED FOR ANY INDIVIDUAL WITH A DISABILITY

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

Agenda

	Purpose	Presenter	Time
I. Opening Items			10:15 AM
A. Call the Meeting to Order		Board President	1 m
B. Record Attendance		Board President	1 m
Roll Call:			
William Hall, President			
Michael Humphrey, Vice President			
Steve Fraire, Clerk			
Susan Houle, Member			
Peter Matz, Member			
II. Pledge of Allegiance			10:17 AM
A. Led by Board President or designee		Board President	1 m
III. Approve/Adopt Agenda			10:18 AM
A. (Action) Approval of August 8, 2024 Board of Directors Study Session		Board President	1 m
It is recommended the Board approve the agenda for the August 8, 2024, Board of Directors Study Session as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).			
Roll Call Vote:			

	Purpose	Presenter	Time
William Hall Michael Humphrey Steve Fraire Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

IV. Approve Minutes

10:19 AM

- | | | | | |
|-----------|--|-----------------|-----------------|-----|
| A. | (Action) Approval of Minutes for June 13, 2024 Regular Meeting of the Board of Directors | Approve Minutes | Board President | 1 m |
|-----------|--|-----------------|-----------------|-----|

It is recommended the Board approve the minutes from the June 13, 2024, Regular Meeting of the Board of Directors as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:

William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Peter Matz
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

- | | | | | |
|-----------|--|-----------------|-----------------|-----|
| B. | (Action) Approval of Minutes for June 20, 2024 Regular Meeting of the Board of Directors | Approve Minutes | Board President | 1 m |
|-----------|--|-----------------|-----------------|-----|

It is recommended the Board approve the minutes from the June 20, 2024, Regular Meeting of the Board of Directors as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:

William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Peter Matz
Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

	Purpose	Presenter	Time
V. Public Comment - Closed Session			
The public has a right to comment on any items of the Closed Session Agenda. Members of the public will be permitted to comment on any other item within the Board's jurisdiction under the section Public Comments/Recognition/Reports.			
VI. Adjourn to Closed Session			10:21 AM
A.	The Board Will Consider and May Act on Any of the Closed Session Matters	Vote Board President	1 m
	Roll Call Vote: William Hall Michael Humphrey Steve Fraire Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____		
VII. Closed Session			10:22 AM
A.	Closed Session Agenda		20 m
	1. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION (Gov. Code Section 54956.9(d)(1).) <i>Case No. 2024050757</i>		
	2. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION (Gov. Code Section 54956.9(d)(1).) <i>Case No. 2023110892</i>		
	3. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION (Gov. Code Section 54956.9(d)(1).) <i>CDE No. S-1144-23/24</i>		
VIII. Reconvene Regular Meeting			10:42 AM
A.	Report Out Any Action Taken in Closed Session	Vote Board President	1 m
IX. Public Comments/Recognition/Reports			
Please submit a Request to Speak to the Board of Directors using the chat feature on the right-hand side of the Zoom platform. Please state the agenda item number that you wish			

	Purpose	Presenter	Time
to address prior to the agenda item being called by the Board President. Not more than three (3) minutes are to be allotted to any one (1) speaker, and no more than twenty (20) minutes on the same subject. This portion of the agenda is for comments, recognitions, and reports to the Board and is not intended to be a question-and-answer period. If you have questions for the Board, please provide the Board President with a written statement, and an administrator will provide answers at a later date.			

X. Consent Agenda			10:43 AM
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Items listed under the Consent Agenda are considered routine and will be approved/adopted by a single motion. There will be no separate discussion of these items; however, any item may be removed from the Consent Agenda upon the request of any member of the Board, discussed, and acted upon separately.

The items below form our Consent Agenda. The last item in this section is a single vote to approve them en masse.

- | | | | |
|---|------|-----------------|-----|
| A. Consent- Policy Development | Vote | Board President | 1 m |
| 1. Approval of Changes to Existing Board Policies | | | |

The following are current policies that have been revised to provide clarity or alignment with changes in law or procedures.

4000 Series- Personnel Services:
4175-SO Salary Advancement Policy

6000 Series- Instruction:
6010-SO Independent Study Policy

Items listed under the Consent Agenda are considered routine and will be approved/adopted by a single motion.

It is recommended the Board approve the Consent Agenda as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Roll Call Vote:
William Hall
Michael Humphrey
Steve Fraire

	Purpose	Presenter	Time
Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			

XI. Board Governance 10:44 AM

- A.** (Action) Approval of 2024-2025 Board Evaluator Stipend Vote Krista Woodgrift 1 m

It is recommended the Board approve a stipend of \$450 per month, totaling \$5,400 annually for each of the two designated Board Evaluators, William Hall and Steve Fraire, for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051). This stipend is for their role in conducting a comprehensive 12-month evaluation of the Superintendent/CEO during the 2024-2025 period.

Fiscal Impact: \$10,800 annually (Combined total for two evaluators.)

Sage Oak Charter School (#1885)	\$8,640
Sage Oak Charter School - Keppel (#1886)	\$1242
Sage Oak Charter School - South (#2051)	\$918

Roll Call Vote:
 William Hall
 Michael Humphrey
 Steve Fraire
 Susan Houle
 Peter Matz
 Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XII. Business Services 10:45 AM

- A.** (Action) Approval of Sage Oak Charter School Petition for Charter Renewal Vote Krista Woodgrift 1 m

It is recommended the Board approve the Sage Oak Charter School Petition for Charter Renewal, effective July 1, 2024, through June 30, 2031.

Fiscal Impact: N/A

Roll Call Vote:

	Purpose	Presenter	Time
William Hall Michael Humphrey Steve Fraire Susan Houle Peter Matz Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____			
B. (Action) Approval of Memorandum of Understanding between Sage Oak Charter School and the Helendale School District	Vote	Tim O'Brien	1 m

It is recommended the Board approve the Memorandum of Understanding between Sage Oak Charter School and the Helendale School District, effective July 1, 2024, through June 30, 2031.

Fiscal Impact: N/A

Roll Call Vote:

William Hall
Michael Humphrey
Steve Fraire
Susan Houle
Peter Matz

Moved by _____ Seconded by _____ Ayes _____ Nays _____ Absent _____

XIII. Human Resources

10:47 AM

A. (Action) Approval of 2024-2025 Superintendent/CEO Evaluation Timeline and Plan	Vote	Krista Woodgrift	2 m
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It is recommended the Board approve the 2024-2025 Superintendent/CEO Evaluation Timeline and Plan as presented for Sage Oak Charter School (#1885), Sage Oak Charter School - Keppel (#1886), and Sage Oak Charter School - South (#2051).

Fiscal Impact: N/A

Roll Call Vote:

William Hall
Michael Humphrey
Steve Fraire
Susan Houle

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

XIV. Oral Presentations 10:49 AM

- | | | | | |
|-----------|--|---------|------------------|------|
| A. | Annual Board of Directors' Self-Evaluation | Discuss | Board President | 25 m |
| B. | Sage Oak Charter Schools Strategic Plan 2024-2027 Update | Discuss | Krista Woodgrift | 30 m |

XV. Calendar

The next scheduled meeting will be a Regular Meeting of the Board of Directors held on September 12, 2024.

XVI. Closing Items 11:44 AM

- | | | | | |
|-----------|------------------|-------------------|-----------------|------------|
| A. | Adjourn Meeting | Vote | Board President | 1 m |
| | Roll Call Vote: | | | |
| | William Hall | | | |
| | Michael Humphrey | | | |
| | Steve Fraire | | | |
| | Susan Houle | | | |
| | Peter Matz | | | |
| | Moved by _____ | Seconded by _____ | Ayes _____ | Nays _____ |
| | | | Absent _____ | |

FOR MORE INFORMATION

For more information concerning this agenda, contact
Sage Oak Charter Schools.

Coversheet

(Action) Approval of Minutes for June 13, 2024 Regular Meeting of the Board of Directors

Section: IV. Approve Minutes
Item: A. (Action) Approval of Minutes for June 13, 2024 Regular Meeting of the Board of Directors
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Regular Meeting of the Board of Directors on June 13, 2024

APPROVED



Sage Oak Charter Schools

Minutes

Regular Meeting of the Board of Directors

Date and Time

Thursday June 13, 2024 at 10:30 AM

Location

Sage Oak Charter Schools

1473 Ford Street, Suite #105
Redlands, CA 92373

Regus- Gateway Chula Vista

333 H Street, Suite 5000
Chula Vista, CA 91910

[Join Zoom Meeting](#)

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Directors Present

P. Matz, S. Fraire, S. Houle, W. Hall

Directors Absent

M. Humphrey

Guests Present

B. Bookser, C. Coffey, E. Horta, K. Cody, K. Woodgrift

I. Opening Items

A. Call the Meeting to Order

W. Hall called a meeting of the board of directors of Sage Oak Charter Schools to order on Thursday Jun 13, 2024 at 10:40 AM.

B. Record Attendance

II. Pledge of Allegiance

A. Led by Board President or designee

W. Hall, Board President, led the meeting in the Pledge of Allegiance.

III. Approve/Adopt Agenda

A. (Action) Approval of Agenda for June 13, 2024 Regular Meeting of the Board of Directors

S. Fraire made a motion to W. Hall, Board President, to approve the agenda for the June 13, 2024, Regular Meeting of the Board of Directors as presented.

S. Houle seconded the motion.

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

Roll Call

S. Fraire Aye
P. Matz Aye
S. Houle Aye
W. Hall Aye
M. Humphrey Absent

IV. Approve Minutes

A. (Action) Approval of Minutes for May 9, 2024 Regular Meeting of the Board of Directors

S. Houle made a motion to W. Hall, Board President, to approve the minutes from the Regular Meeting of the Board of Directors on 05-09-24.

P. Matz seconded the motion.

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

Roll Call

P. Matz Aye
W. Hall Aye
S. Houle Aye
S. Fraire Aye
M. Humphrey Absent

V. Public Comments/Recognition/Reports

A. Public Comment

There was no request for public comment.

VI. Correspondence/Proposals/Reports

A. 2023-2024 School Year in Review - Presented by Krista Woodgrift, Superintendent of Schools and CEO

Krista Woodgrift presented the school year in review highlights.

VII. Consent Agenda

A. Consent - Business Financial/Services

1. Check Register - May 2024
2. Ratification of North Orange County Community College District, Application and Agreement of Use of Facilities
3. Ratification of Association of Personalized Learning Schools & Services (APlus+), Contract Services Agreement (Renewal)
4. Ratification of 2024-2025 Tech & Mortar, LLC Statement of Work (Renewal)

5. Ratification of Phoenix Performance Partners Proposal
6. Ratification of ClickUp Professional Services Statement of Work
7. Ratification of Splashtop Quote (Renewal)
8. Ratification of Parsec Education Inc., Service Order - Consulting
9. Ratification of Parsec Education Inc., Service Order - Strategic Planning Platform
10. Ratification of Property and Casualty Insurance Policy Renewals
11. Approval of Community Provider (CP) and Education Material Resource Provider (EMRP) Agreement Revisions
12. Ratification of School Pathways, LLC Quote Form with Sage Oak Charter School (GG4L)
13. Ratification of School Pathways, LLC Quote Form with Sage Oak Charter School - South (GG4L)
14. Ratification of Instructure, Inc. Services Order Form (Canvas Renewal)
15. Ratification of School Pathways, LLC Quote Form #17034
16. Ratification of Tech to School Quote

B. Consent - Personnel Services

1. Approval of Certificated Personnel Report
2. Approval of Classified Personnel Report
3. Approval of Job Descriptions
4. Approval of 2024-2025 Sage Oak Charter Schools Employee Handbook Revisions

C. Consent- Policy Development

1. Approval of Changes to Existing Board Policies Revised/Reviewed/Rescinded

1000 Series- Community Relations: Revised

1025-SO Uniform Complaint Policy

1035-SO Access to Public Records Policy

5000 Series- Student Services: Revised

5030-SO Immunization Policy

6000 Series- Instruction: Revised

6020-SO Education for Homeless Children and Youth Policy

6025-SO Section 504 Policy

6030-SO Education for Foster and Mobile Youth Policy

6040-SO Assessment Policy

6060-SO Special Education Assessment Request Policy

6070-SO Independent Educational Evaluation Policy

6150-SO Intervention Policy

6115-SO Attendance, Support, and Involuntary Disenrollment Policy

6140-SO Satisfactory Educational Progress Policy

6210-SO Graduation Policy

1000 Series- Community Relations: Reviewed (No changes, but annual review required.)

1010-SO Civility Policy

6000 Series- Instruction: Reviewed (No changes but annual review required.)

6055-SO Educational Activity Policy

6000 Series- Instruction: Rescinded

6050-SO Virtual Proctoring Policy

D. Consent - Student Services

1. Approval of Sage Oak Charter Schools Parent and Student Handbook
2. Approval of Sage Oak Charter Schools Title I School-Parent/Guardian Compact

E. (Action) Approval of Consent Agenda

S. Houle made a motion to W. Hall, Board President, to approve the items listed under the Consent Agenda as presented.

S. Fraire seconded the motion.

Items listed under the Consent Agenda are considered routine and will be approved/adopted by a single motion.

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

Roll Call

P. Matz	Aye
M. Humphrey	Absent
W. Hall	Aye
S. Houle	Aye
S. Fraire	Aye

VIII. Business Financial/Services

A. (Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2023-2024 Annual Reports for Sage Oak Charter Schools

P. Matz made a motion to W. Hall, Board President, to approve Proposition 28, Arts and Music in Schools funding, 2023-2024 Annual Reports for Sage Oak Charter Schools as presented.

S. Fraire seconded the motion.

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

Roll Call

M. Humphrey	Absent
S. Fraire	Aye

Roll Call

P. Matz Aye
W. Hall Aye
S. Houle Aye

B. (Action) Approval of Proposition 28 Arts and Music in Schools Funding, 2023-2024 Annual Certifications for Sage Oak Charter Schools

S. Houle made a motion to W. Hall, Board President, to approve Proposition 28 Arts and Music in Schools funding, 2023-2024 Annual Certifications for Sage Oak Charter Schools as presented.

S. Fraire seconded the motion.

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

Roll Call

W. Hall Aye
P. Matz Aye
M. Humphrey Absent
S. Houle Aye
S. Fraire Aye

IX. Operations and Accountability Services

A. (Action) Approval of Sage Oak Charter Schools English Learner (EL) Master Plan 2024-2025

S. Houle made a motion to W. Hall, Board President, to approve the Sage Oak Charter Schools English Learner (EL) Master Plan 2024-2025 as presented.

P. Matz seconded the motion.

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

Roll Call

S. Fraire Aye
W. Hall Aye
P. Matz Aye
M. Humphrey Absent
S. Houle Aye

X. Personnel Services

A. (Action) Approval of Director of Human Resources: Talent and Engagement Candidate

S. Houle made a motion to W. Hall, Board President, to approve the Director of Human Resources: Talent and Engagement Candidate, Kerry Cody, and be placed on step C of Range 17A with an annual salary of \$164,384.

S. Fraire seconded the motion.

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

Roll Call

S. Houle Aye
M. Humphrey Absent
W. Hall Aye
P. Matz Aye
S. Fraire Aye

XI. Public Hearing

A. (Hearing) 2024-2025 Local Control and Accountability Plans (LCAP) for Sage Oak Charter Schools and Local Performance Indicator Self-Reflection Reports for the California School Dashboard, First Reading

A Public Hearing was conducted regarding the 2024-2025 Local Control and Accountability Plans (LCAP) for Sage Oak Charter Schools.

Lisa Thompson, Assistant Superintendent of Operations and Accountability presented the LCAPs for 2024-2025 and the Local Performance Indicators.

There was no request for public comment.

Hearing Opened: 11:07 a.m.

Hearing Closed: 11:27 a.m.

B. (Hearing) 2024-2025 Proposed July Budget - Sage Oak Charter Schools, First Reading

A Public Hearing was conducted regarding the 2024-2025 Proposed July Budget for Sage Oak Charter Schools.

Tim O'Brien, Assistant Superintendent of Business Services presented the 2024-2025 Proposed July Budget.

There was no request for public comment.

Hearing Opened: 11:28 a.m.

Hearing Closed: 11:44 a.m.

XII. Calendar

A. Future Meetings

The next scheduled meeting will be a Regular Board of Directors Meeting held on June 20, 2024.

XIII. Comments

A. Board Comments

The Board welcomed Kerry Cody to the Sage Oak leadership team and recognized Superintendent Woodgrift for her long-term impact on staff retention rates. They praised the team's cohesiveness and committed efforts, contributing to a positive and productive environment.

B. Superintendent Comments

Superintendent Woodgrift expressed her excitement for Kerry Cody joining the leadership team and looks forward to her contributions. She announced that the August Board study session will include the Board's evaluation, with preparation details to follow over the summer. Ms. Woodgrift congratulated everyone on an outstanding year, highlighting the team's synergy and commitment to students, and looks forward to another great year ahead.

XIV. Closing Items

A. Adjourn Meeting

P. Matz made a motion to W. Hall, Board President, to adjourn the Regular Meeting of the Board of Directors on June 13, 2024.

S. Fraire seconded the motion.

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

Roll Call

S. Fraire Aye

P. Matz Aye

S. Houle Aye

W. Hall Aye

M. Humphrey Absent

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 11:50 AM.

Respectfully Submitted,

W. Hall

Documents used during the meeting

- Sage Oak Charter Schools Monthly Updates_May 2024.pdf
- BUS Consent - Business_Financial Services_6.13.2024.pdf
- Check Register - May 2024.pdf
- North Orange County Community College District, Application and Agreement of Use of Facilities_6.13.2024.pdf

- Association of Personalized Learning Schools & Services (APlus+), Contract Services Agreement (Renewal)_6.13.2024.pdf
- 2024-2025 Tech & Mortar, LLC Statement of Work (Renewal)_6.13.2024.pdf
- Phoenix Performace Partners Proposal_6.13.2024.pdf
- ClickUp Professional Services Statement of Work_6.13.2024.pdf
- Splashtop Quote (Renewal)_6.13.2024.pdf
- Parsec Education Inc., Service Order - Consulting_6.13.2024.pdf
- Parsec Education Inc., Service Order - Strategic Planning Platform_6.13.2024.pdf
- Property and Casualty Insurance Policy Renewals_6.13.2024.pdf
- Community Provider (CP) and Education Material Resource Provider (EMRP) Agreement Revisions_6.13.2024.pdf
- School Pathways, LLC Quote Form with Sage Oak Charter School (GG4L)_6.13.2024.pdf
- School Pathways, LLC Quote Form with Sage Oak Charter School - South (GG4L)_6.13.2024.pdf
- Instructure, Inc. Services Order Form (Canvas Renewal)_6.13.2024.pdf
- School Pathways, LLC Quote Form #17034_6.13.2024.pdf
- Tech to School Quote_6.13.2024.pdf
- BUS Consent - Personnel Services_6.13.2024.pdf
- Job Descriptions_6.13.2024.pdf
- 2024-2025 Sage Oak Charter Schools Employee Handbook Revisions_6.13.2024.pdf
- BUS Consent - Policy Development_6.13.2024.pdf
- BUS Consent - Student Services_6.13.2024.pdf
- Sage Oak Charter Schools Parent and Student Handbook_6.13.2024.pdf
- Sage Oak Charter Schools Title I School-Parent_Guardian Compact_6.13.2024.pdf
- Proposition 28 Arts and Music in Schools Funding, 2023-2024 Annual Report_Sage Oak Charter School #1885_6.13.2024.pdf
- Proposition 28 Arts and Music in Schools Funding, 2023-2024 Annual Report_Sage Oak Charter School - Keppel #1886_6.13.2024.pdf
- Proposition 28 Arts and Music in Schools Funding, 2023-2024 Annual Report_Sage Oak Charter School - South #2051_6.13.2024.pdf
- Proposition 28 Arts and Music in Schools Funding, 2023-2024 Annual Certification_Sage Oak Charter School #1885_6.13.2024.pdf
- Proposition 28 Arts and Music in Schools Funding, 2023-2024 Annual Certification_Sage Oak Charter School - Keppel #1886_6.13.2024.pdf
- Proposition 28 Arts and Music in Schools Funding, 2023-2024 Annual Certification_Sage Oak Charter School - South #2051_6.13.2024.pdf

- Sage Oak Charter Schools English Learner Master Plan 2024-2025_Presentation_6.13.2024.pdf
- Sage Oak Charter Schools English Learner Master Plan 2024-2025_6.13.2024.pdf
- Sage Oak Charter Schools English Learner Master Plan 2024-2025_Redline_6.13.2024.pdf
- Summary of Changes_English Learner Master Plan 2024-2025_6.13.2024.pdf
- Kerry Cody_6.13.2024.pdf
- 2024-2025 Local Control and Accountability Plans (LCAP) & Local Indicators Presentation_6.13.2024.pdf
- 2024-2025 LCAP Plan Summary - Sage Oak Charter School #1885_6.13.2024.pdf
- 2024-2025 LCAP Plan Summary - Sage Oak Charter School - Keppel #1886_6.13.2024.pdf
- 2024-2025 LCAP Plan Summary - Sage Oak Charter School - South #2051_6.13.2024.pdf
- 2024-2025 Local Performance Indicator Self-Reflection Report - Sage Oak Charter School #1885_6.13.2024.pdf
- 2024-2025 Local Performance Indicator Self-Reflection Report - Sage Oak Charter School - Keppel #1886_6.13.2024.pdf
- 2024-2025 Local Performance Indicator Self-Reflection Report - Sage Oak Charter School - South #2051_6.13.2024.pdf
- 2024-2025 Proposed July Budget Presentation_6.13.2024.pdf
- 2024-2025 Proposed July Budget - Sage Oak Charter Schools_6.13.2024.pdf
- 2024-2025 LCFF Budget Overview for Parents - Sage Oak Charter School #1885_6.13.2024.pdf
- 2024-2025 LCFF Budget Overview for Parents - Sage Oak Charter School - Keppel #1886_6.13.2024.pdf
- 2024-2025 LCFF Budget Overview for Parents - Sage Oak Charter School - South #2051_6.13.2024.pdf
- Education Protection Account (EPA) - Sage Oak Charter School #1885_6.13.2024.pdf
- Education Protection Account (EPA) - Sage Oak Charter School - Keppel #1886_6.13.2024.pdf
- Education Protection Account (EPA) - Sage Oak Charter School - South #2051_6.13.2024.pdf

FOR MORE INFORMATION

For more information concerning this agenda, contact
Sage Oak Charter Schools.

Coversheet

(Action) Approval of Minutes for June 20, 2024 Regular Meeting of the Board of Directors

Section: IV. Approve Minutes
Item: B. (Action) Approval of Minutes for June 20, 2024 Regular Meeting of the Board of Directors
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Regular Meeting of the Board of Directors on June 20, 2024

APPROVED



Sage Oak Charter Schools

Minutes

Regular Meeting of the Board of Directors

Date and Time

Thursday June 20, 2024 at 9:25 AM

Location

Sage Oak Charter Schools

1473 Ford Street, Suite #105
Redlands, CA 92373

[Join Zoom Meeting](#)

ID: 92309435696

Passcode: 501207

[\(US\) +1 346-248-7799](#)

Passcode: 501207

Teleconference Locations

1185 Calle Dulce, Chula Vista, CA 91910
39251 Camino Las Hoyas, Indio, CA 92203
16222 Quail Rock Road, Ramona, CA 92065
1160 Cuyamaca Avenue, Chula Vista, CA 91911
25 Kingston Court E., Coronado CA 92118

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Directors Present

M. Humphrey (remote), S. Fraire (remote), S. Houle (remote), W. Hall (remote)

Directors Absent

P. Matz

Guests Present

E. Horta (remote), K. Woodgrift (remote)

I. Opening Items

A. Call the Meeting to Order

W. Hall called a meeting of the board of directors of Sage Oak Charter Schools to order on Thursday Jun 20, 2024 at 9:31 AM.

B. Record Attendance

II. Pledge of Allegiance

A. Led by Board President or designee

W. Hall, Board President, led the meeting in the Pledge of Allegiance.

III. Approve/Adopt Agenda

A. (Action) Approval of Agenda for June 20, 2024 Regular Meeting of the Board of Directors

M. Humphrey made a motion to W. Hall, Board President, to approve the agenda for the June 20, 2024, Regular Meeting of the Board of Directors.

S. Fraire seconded the motion.

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

Roll Call

P. Matz Absent

M. Humphrey Aye

S. Houle Aye

S. Fraire Aye

W. Hall Aye

IV. Public Comments/Recognition/Reports

A. Public Comment

There was no request for public comment.

V. Business Financial/Services

A. (Action) Approval of Sage Oak Charter School - South Petition for Charter Renewal

S. Houle made a motion to W. Hall, Board President, to approve the Sage Oak Charter School - South Petition for Charter Renewal as presented.

S. Fraire seconded the motion.

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

Roll Call

M. Humphrey Aye

S. Houle Aye

P. Matz Absent

S. Fraire Aye

W. Hall Aye

B. (Action) Approval of Memorandum of Understanding between Sage Oak Charter School - South and the Warner Unified School District

M. Humphrey made a motion to W. Hall, Board President, to approve the Memorandum of Understanding between Sage Oak Charter School - South and the Warner Unified School District as presented.

S. Houle seconded the motion.

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

Roll Call

W. Hall Aye

P. Matz Absent

M. Humphrey Aye

S. Fraire Aye

S. Houle Aye

C. (Action) Adoption of 2024-2025 July Budget - Sage Oak Charter Schools

S. Fraire made a motion to W. Hall, Board President, to adopt the 2024-2025 July Budget for Sage Oak Charter Schools as presented.

S. Houle seconded the motion.

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

Roll Call

W. Hall	Aye
S. Houle	Aye
P. Matz	Absent
S. Fraire	Aye
M. Humphrey	Aye

VI. Operations and Accountability

A. (Action) Adoption of 2024-2025 Local Control and Accountability Plans (LCAP)

M. Humphrey made a motion to W. Hall, Board President, to adopt the 2024-2025 Local Control and Accountability Plans as presented.

S. Fraire seconded the motion.

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

Roll Call

P. Matz	Absent
M. Humphrey	Aye
S. Houle	Aye
W. Hall	Aye
S. Fraire	Aye

B. (Action) Approval of 2024-2025 Local Performance Indicator Self-Reflection Reports for Sage Oak Charter Schools

S. Fraire made a motion to W. Hall, Board President, to approve the 2024-2025 Local Performance Indicator Self-Reflection Reports for Sage Oak Charter Schools as presented.

S. Houle seconded the motion.

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

Roll Call

P. Matz	Absent
S. Fraire	Aye
W. Hall	Aye
M. Humphrey	Aye
S. Houle	Aye

VII. Personnel Services

A.

(Action) Approval of Variable Term Waiver Request

S. Fraire made a motion to W. Hall, Board President, to approve the Variable Term Waiver Request for Chelsey Weis, Speech Language Pathologist, as presented.

S. Houle seconded the motion.

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

Roll Call

S. Fraire Aye
S. Houle Aye
P. Matz Absent
M. Humphrey Aye

B. (Action) Approval of Extension of Employment Agreement and Salary Schedule for the Superintendent of Schools/CEO

S. Houle made a motion to W. Hall, Board President, to approve the extension of the Employment Agreement and the Salary Schedule for the Superintendent of Schools/CEO as presented.

M. Humphrey seconded the motion.

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

Roll Call

M. Humphrey Aye
P. Matz Absent
S. Houle Aye
S. Fraire Aye
W. Hall Aye

VIII. Calendar

A. Future Meetings

The next scheduled meeting will be a Board of Directors Study Session held on August 8, 2024.

IX. Comments

A. Board Comments

The Board expressed gratitude for Sage Oak's hard work and efficiency, specifically highlighting the LCAP and end-of-year items. Board President Hall commented that the renewal of the charter petition for the next seven years is a testament to Sage Oak's excellence.

B. Superintendent Comments

Superintendent Woodgrift shared that the vote for the seven-year charter renewal petition for Sage Oak Charter School with the Helendale School District will be held next week,

and will follow up via email with the results. Ms. Woodgrift looks forward to seeing everyone again in August.

X. Closing Items

A. Adjourn Meeting

S. Fraire made a motion to W. Hall, Board President, to adjourn the Regular Meeting of the Board of Directors on June 20, 2024.

S. Houle seconded the motion.

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

Roll Call

P. Matz Absent

M. Humphrey Aye

S. Fraire Aye

W. Hall Aye

S. Houle Aye

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:48 AM.

Respectfully Submitted,
W. Hall

Documents used during the meeting

- Sage Oak Charter School - South Petition for Charter Renewal_Final_6.20.2024.pdf
- Memorandum of Understanding_Sage Oak Charter School - South_Warner Unified School District_FINAL_6.20.2024.pdf
- 2024-2025 July Budget - Sage Oak Charter Schools_6.20.2024.pdf
- 2024-2025 LCFF Budget Overview for Parents - Sage Oak Charter School #1885_6.20.2024.pdf
- 2024-2025 LCFF Budget Overview for Parents - Sage Oak Charter School - Keppel #1886_6.20.2024.pdf
- 2024-2025 LCFF Budget Overview for Parents - Sage Oak Charter School - South #2051_6.20.2024.pdf
- Education Protection Account (EPA) - Sage Oak Charter School #1885_6.20.2024.pdf
- Education Protection Account (EPA) - Sage Oak Charter School - Keppel #1886_6.20.2024.pdf
- Education Protection Account (EPA) - Sage Oak Charter School - South #2051_6.20.2024.pdf
- 2024-2025 LCAP Plan Summary - Sage Oak Charter School #1885_6.20.2024.pdf

- 2024-2025 LCAP Plan Summary - Sage Oak Charter School - Keppel #1886_6.20.2024.pdf
 - 2024-2025 LCAP Plan Summary - Sage Oak Charter School - South #2051_6.20.2024.pdf
 - 2024-2025 Local Performance Indicator Self-Reflection Report - Sage Oak Charter School #1885_6.20.2024.pdf
 - 2024-2025 Local Performance Indicator Self-Reflection Report - Sage Oak Charter School - Keppel #1886_6.20.2024.pdf
 - 2024-2025 Local Performance Indicator Self-Reflection Report - Sage Oak Charter School - South #2051_6.20.2024.pdf
 - Employment Agreement_Extension & Salary Schedule Language_ Superintendent of Schools & CEO_6.20.2024.pdf
 - Salary Schedule_Superintendent of Schools & CEO_6.20.2024.pdf
-

FOR MORE INFORMATION

For more information concerning this agenda, contact
Sage Oak Charter Schools.

Coversheet

Consent- Policy Development

Section: X. Consent Agenda
Item: A. Consent- Policy Development
Purpose: Vote
Submitted by:
Related Material: BUS Consent - Policy Development_8.8.2024.pdf

SAGE OAK CHARTER SCHOOLS

Regular Meeting of the Board of Directors- August 8, 2024

BUS Consent Items - Policy Development

Items listed under Consent are considered routine and will be approved/adopted by a single motion.

1. Item: Approval of Changes to Existing Board Policies Revised/Reviewed

Background:

To ensure adherence with current state and federal laws related to instruction, policies are reviewed and updated accordingly to provide clarity and alignment in support of effective governance.

4000 Series - Personnel Services

[4175-SO Salary Advancement Policy](#)

[Redline Version](#)

Sage Oak Charter Schools is requesting the Board approve revisions to the salary advancement policy. In addition to the existing requirement of serving at least 80% of the fiscal year in active, paid status, the revised policy introduces new eligibility criteria for advancement to include working between 80-100% of a full-time equivalent (FTE). This change aims to align SOCS's policy with industry standards. Additionally, clarifying language regarding the aggregation of service has been added to reflect this new criterion.

6000 Series -

[6010-SO Independent Study Policy](#)

[Redline Version](#)

Updates were made to the Independent Study policy to align with the 24-25 CA budget trailer bill. These changes included changing short term independent study from 14 to 15 days. Clarifying language was also added indicating that evidence of student participation in synchronous instruction may include pupil work produced or performed during that time, **or documentation that the pupil participated either visually or verbally.**

Recommendation:

It is recommended the Board approve the changes to the Board policies, as presented.

Coversheet

(Action) Approval of Sage Oak Charter School Petition for Charter Renewal

Section: XII. Business Services
Item: A. (Action) Approval of Sage Oak Charter School Petition for Charter Renewal
Purpose: Vote
Submitted by:
Related Material: Sage Oak Charter School Petition for Charter Renewal_Final_8.8.2024.pdf

BACKGROUND:

On June 26, 2024, the Helendale School District Governing Board unanimously approved the Sage Oak Charter School petition for charter renewal.

RECOMMENDATION:

It is recommended the Board approve the Sage Oak Charter School petition for charter renewal, effective July 1, 2024, through June 30, 2031.

Sage Oak Charter School

Charter School Petition



Presented to:
Helendale School District
Helendale, CA

July 1, 2024 – June 30, 2031

Presented by:
Krista Woodgrift
Superintendent & CEO, Sage Oak Charter School
(888) 435-4445

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AFFIRMATIONS AND DECLARATION

As the authorized lead petitioner, I, Krista Woodgrift, hereby certify that the information submitted in this renewal petition for a California public charter school, Sage Oak Charter School (“SOCS” or the “Charter School”), operated by Sage Oak Charter Schools, and to be authorized by the Helendale School District (“HSD” or the “District”) is true to the best of our knowledge and belief; I also certify that this application does not constitute the conversion of a private school to the status of a public charter school; and further, I certify that SOCS shall follow any and all other federal, state, and local laws and regulations that apply to SOCS including but not limited to shall follow any and all other federal, state, and local laws and regulations that apply to SOCS. Specifically, SOCS:

- Shall meet all statewide standards and conduct the student assessments required, pursuant to Education Code Section 60605, and any other statewide standards authorized in statute, or student assessments applicable to students in non-charter public schools. [Ref. Education Code Section 47605(d)(1)]
- Declares that it shall be deemed the exclusive public school employer of the employees of SOCS for purposes of the Educational Employment Relations Act. [Ref. Education Code Section 47605(c)(6)]
- Shall be non-sectarian in its programs, admissions policies, employment practices, and all other operations. [Ref. Education Code Section 47605(e)(1)]
- Shall not charge tuition. [Ref. Education Code Section 47605(e)(1)]
- Shall admit all students who wish to attend Charter School, unless SOCS receives a greater number of applications than there are spaces for students, in which case it will hold a public random drawing to determine admission. Except as required by Education Code Section 47605(e)(2) and Education Code Section 51747.3, admission to the Charter School shall not be determined according to the place of residence of the student or that student’s parent or legal guardian within the State. Preference in the public random drawing shall be given as required by Education Code Section 47605(e)(2)(B)(i)-(iv). In the event of a drawing, the chartering authority shall make reasonable efforts to accommodate the growth of the Charter School in accordance with Education Code Section 47605(e)(2)(C). [Ref. Education Code Section 47605(e)(2)(A)-(C)]
- Shall not discourage a student from enrolling or seeking to enroll in the Charter School for any reason, including, but not limited to, the academic performance of the student or because the student exhibits any of the characteristics: disability, low academic achievement, English learner status, described in Education Code Section 47605(e)(2)(B)(iii). [Ref. Education Code Sections 47605(e)(2)(B)(iii) and (4)(A) (“pupils with disabilities, academically low-achieving pupils, English learners, neglected or delinquent pupils, homeless pupils, or pupils who are economically disadvantaged, as determined by eligibility for any free or reduced-price meal program, foster youth, or pupils based on nationality, race, ethnicity, or sexual orientation.”)]

- Shall not request a student's records or require a parent, guardian, or student to submit the student's records to the Charter School before enrollment. [Ref. Education Code Section 47605(e)(4)(B).]
- Shall not encourage a student currently attending the Charter School to disenroll from the Charter School or transfer to another school for any reason, including, but not limited to, the academic performance of the student or because the student exhibits any of the characteristics described in Education Code Section 47605(e)(2)(B)(iii), with the exception of legally-permissible actions to suspend, expel, or involuntarily remove a student. [Ref. Education Code Section 47605(e)(4)(C).]
- Shall not discriminate on the basis of the characteristics listed in Education Code Section 220 (actual or perceived disability, gender, gender identity, gender expression, nationality, race or ethnicity, religion, sexual orientation, or any other characteristic that is contained in the definition of hate crimes set forth in Section 422.55 of the Penal Code, including immigration status, or association with an individual who has any of the aforementioned characteristics). [Ref. Education Code Section 47605(e)(1)]
- Shall adhere to all provisions of federal law related to students with disabilities including, but not limited to, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, and the Individuals with Disabilities Education Improvement Act of 2004.
- Shall meet all requirements for employment set forth in applicable provisions of law, including, but not limited to credentials, as necessary. [Ref. California Code of Regulations, Title 5, Section 11967.5.1(f)(5)(c)]
- Shall ensure that teachers at SOCS hold the Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment. The Charter School may use local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers, in the same manner as a governing board of a school district. Teachers employed by charter schools during the 2019–20 school year shall have until July 1, 2025, to obtain the certificate required for the teacher's certificated assignment. [Ref. Education Code Sections 47605(l) and 47605.4(a)]
- Shall at all times maintain all necessary and appropriate insurance coverage.
- Shall, for each fiscal year, offer at a minimum, the number of minutes of instruction per grade level as required by Education Code Section 47612.5(a)(1)(A)–(D).
- If a student is expelled or leaves SOCS without graduating or completing the school year for any reason, SOCS shall notify the superintendent of the school district of the student's last known address within 30 days, and shall, upon request, provide that school district with a copy of the cumulative record of the student, including report cards or a transcript of grades, and health information. If the pupil is subsequently expelled or leaves the school district

without graduating or completing the school year for any reason, the school district shall provide this information to the Charter School within 30 days if the Charter School demonstrates that the pupil had been enrolled in the Charter School. [Ref. Education Code Section 47605(e)(3)]

- May encourage parental involvement, but shall notify the parents and guardians of applicant pupils and currently enrolled pupils that parental involvement is not a requirement for acceptance to, or continued enrollment at, the Charter School. [Ref. Education Code Section 47605(n)]
- Shall maintain accurate and contemporaneous written records that document all student attendance and make these records available for audit and inspection. [Ref. Education Code Section 47612.5(a)(2)]
- Shall on a regular basis consult with its parent/guardians and teachers regarding SOCS's education programs. [Ref. Education Code Section 47605(d)]
- Shall comply with any applicable jurisdictional limitations to the locations of its facilities. [Ref. Education Code Sections 47605 and 47605.1]
- Shall comply with all laws establishing the minimum and maximum age for public school enrollment. [Ref. Education Code Sections 47612(b) and 47610(c)]
- Shall comply with all applicable portions of the Elementary and Secondary Education Act ("ESEA"), as reauthorized and amended by the Every Student Succeeds Act ("ESSA").
- Shall comply with the Public Records Act.
- Shall comply with the Family Educational Rights and Privacy Act.
- Shall comply with the Ralph M. Brown Act.
- Shall comply with Government Code Section 1090, *et seq.*, as set forth in Education Code Section 47604.1.
- Shall comply with the Political Reform Act.
- Shall meet or exceed the legally required minimum number of school days. [Ref. California Code of Regulations, Title 5, Section 11960(b)]

Lead Petitioner Signature

Date

SUCSESSES & ACCOMPLISHMENTS

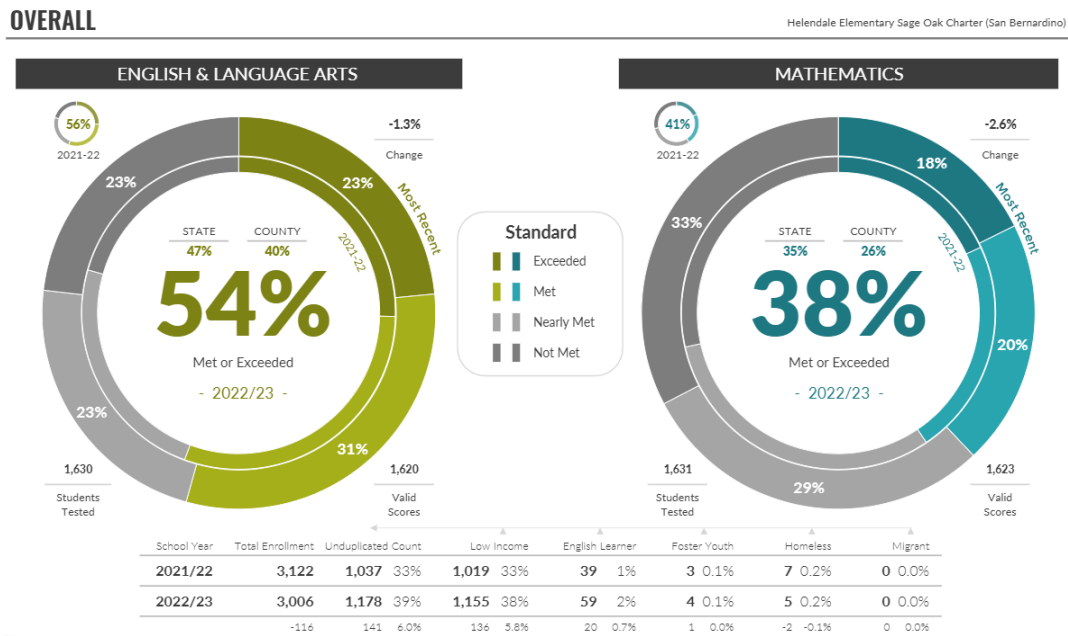
- Western Association of Schools and Colleges (WASC) accredited
- NCAA (The National Collegiate Athletic Association) certified
- National Honor Society members
- President’s Volunteer Service Award certifying organization
- President’s Academic Excellence Award Program certifying organization

CHARTER RENEWAL CRITERIA

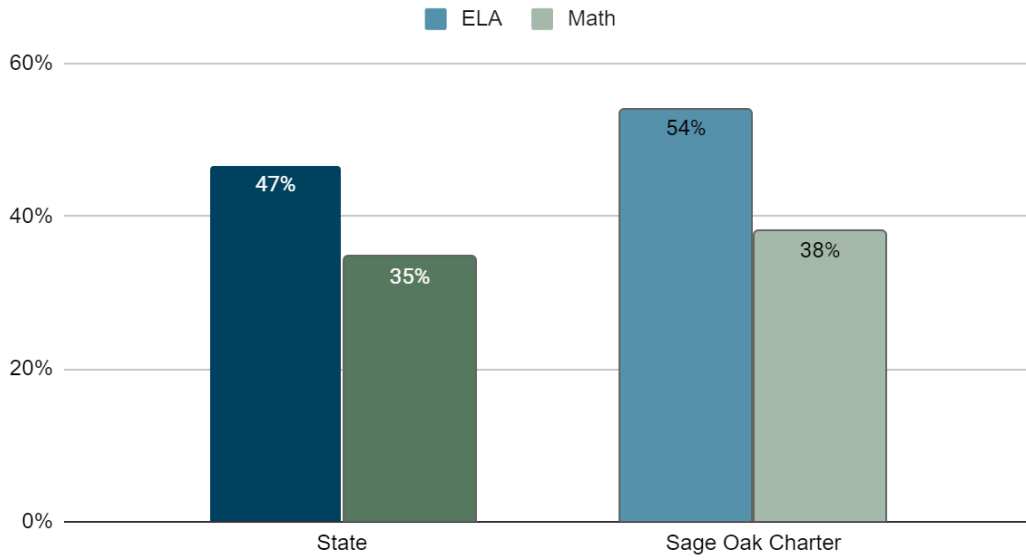
SOCS has earned a designation in the high-performance category for charter renewal tied to performance metrics outlined by the California Department of Education, particularly through Criterion 2. This criterion evaluates charter schools based on their fulfillment of the California School Dashboard performance categories.

The evaluation process involves a comprehensive analysis where student groups are compared to statewide averages to assess the school's effectiveness in fostering academic progress and preparing students for future success. Specifically, the process filters out student groups that perform above the statewide average, focusing the analysis on those that need the most attention, thereby ensuring a fair and equitable assessment. Charter schools are expected to demonstrate their ability to achieve measurable increases in academic achievement to be designated high-performing.

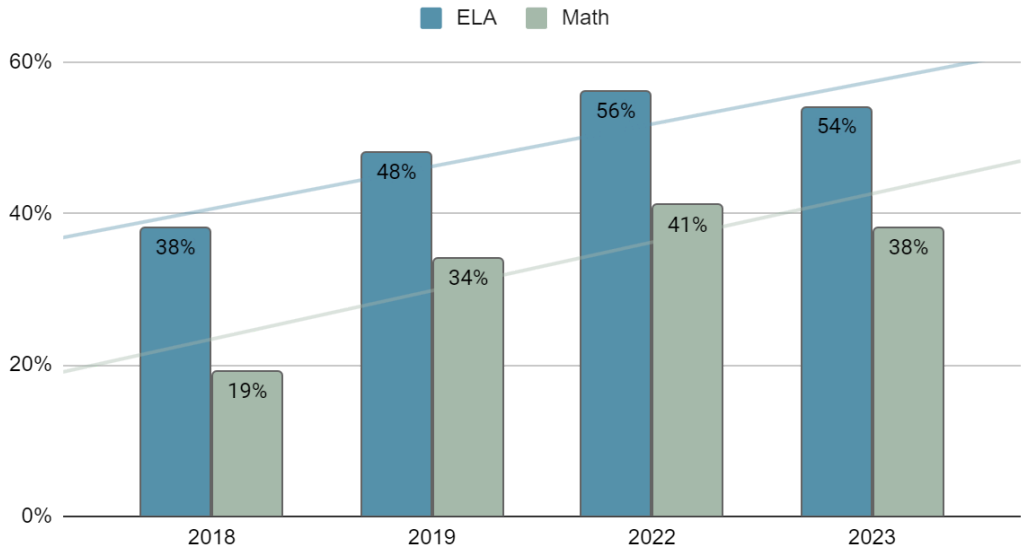
Sage Oak Charter School's Academic Achievement



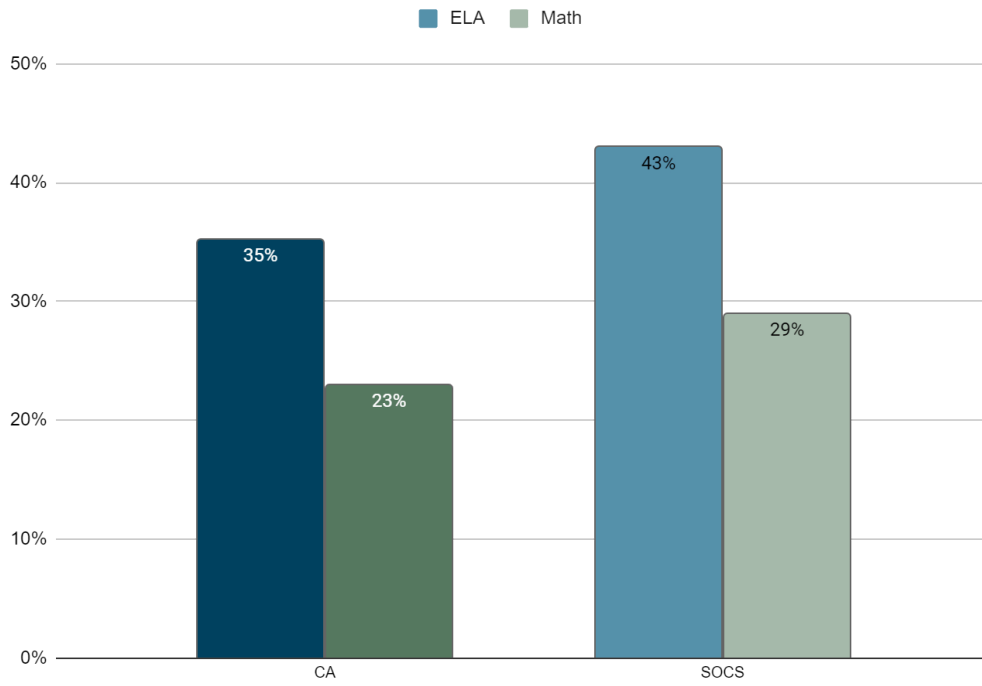
CAASPP - Students Met/Exceeded Standard



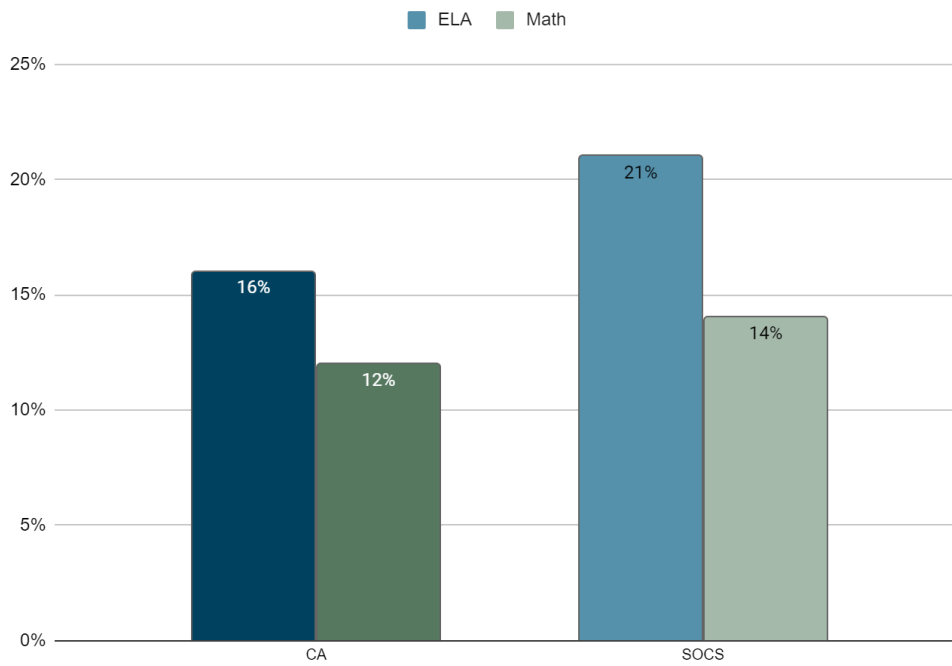
SOCS Year over Year Comparison



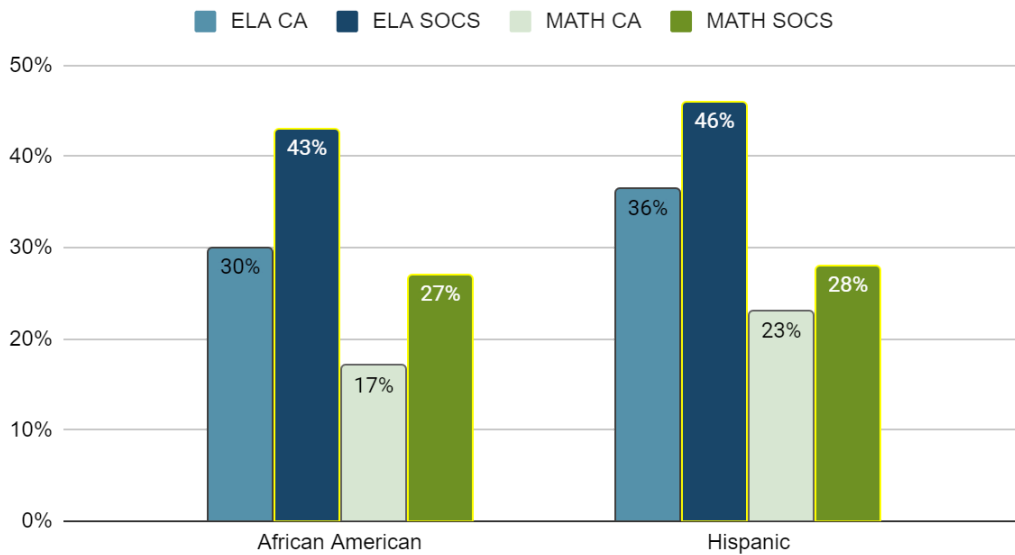
Socio-economically Disadvantaged Met/Exceeded Standard - CA/SOCS Comparison



Students with Disabilities Met/Exceeded Standard - CA/SOCS Comparison



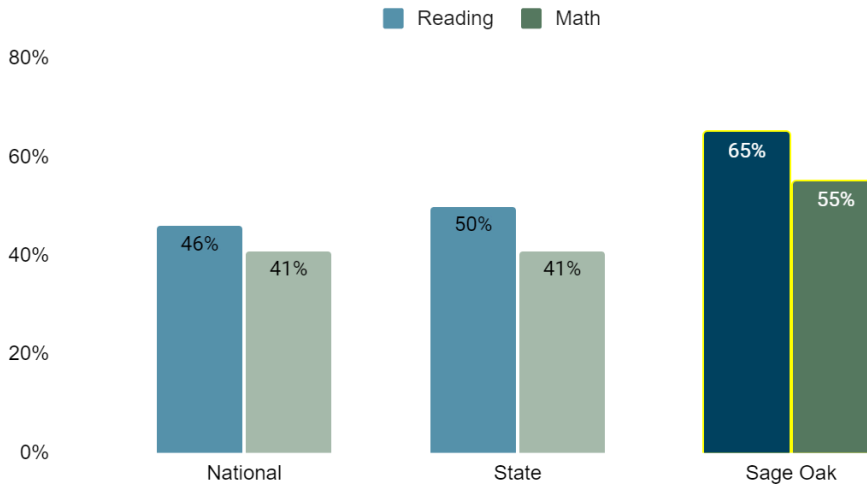
Student Groups Met/Exceeded Standard - CAASPP



*Note that White, Asian, 2 or More Races, and Filipino not used in charter school performance categories.

	CHRONIC ABSENTEEISM	SUSPENSION RATE	COLLEGE CAREER Indicator (CCI)	GRADUATION RATE	English Learner Progress Indicator (ELPI)	ENGLISH LANGUAGE ARTS	MATHEMATICS
CALIFORNIA	24.3%	3.5%	Medium 43.9%	86.4%	48.70%	-13.6	-49.1
Sage Oak	2.4%	0%	High 56.9%	92%	60%	4	-31.3

K-8 State i-Ready Comparison - At/Above Grade Level



Conclusion

SOCS’s designation as high-performing under these rigorous standards reflects a commitment to academic excellence and effective strategies for student advancement. The success in meeting Criterion 2’s requirements not only highlights the dedication to educational quality but also secures the eligibility for a seven-year charter renewal, allowing SOCS to continue the mission of providing outstanding educational opportunities to students.

This data shall serve as documentation confirming that SOCS meets the statutory criteria for renewal as set forth in Education Code Section 47607(a)(3)(A).

ELEMENT 1: EDUCATIONAL PLAN

Governing Law: The educational program of the charter school, designed, among other things, to identify those whom the charter school is attempting to educate, what it means to be an “educated person” in the 21st century, and how learning best occurs. The goals identified in that program shall include the objective of enabling students to become self-motivated, competent, and lifelong learners. – California Education Code Section 47605(c)(5)(A)(i).

The annual goals for the charter school for all students and for each subgroup of students identified pursuant to Section 52052, to be achieved in the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served, and specific annual actions to achieve those goals. A charter petition may identify additional school priorities, the goals for the school priorities, and the specific annual actions to achieve those goals. – California Education Code Section 47605(c)(5)(A)(ii).

If the proposed charter school will serve high school students, the manner in which the charter school will inform parents/guardians about the transferability of courses to other public high schools and the eligibility of courses to meet college entrance requirements. Courses offered by the charter school that are accredited by the Western Association of Schools and Colleges may be considered transferable and courses approved by the University of California or the California State University as creditable under the “A” to “G” admissions criteria may be considered to meet college entrance requirements. – California Education Code Section 47605(c)(5)(A)(iii).

1) Mission

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

2) Vision

PERSONALIZATION: We will provide an educational experience of personalized learning and academic choice, within the state guidelines. Our learning model will afford families the peace of mind that they are participating in a program that will keep their students on track for learning, regardless of the school they attend.

SUPPORT: Our priority is to support individualized student learning by collaborating with the parent and the student. We will utilize staff strengths, professional development opportunities, and community resources to support our students in their journey to become lifelong learners and reach academic excellence.

ACCOUNTABILITY: We are committed to maintaining sustainability through academic, fiscal, and legal accountability. We will meet the criteria necessary to achieve renewal, ensure audit compliance annually, and continue compliance with legal regulations governing our school.

GROWTH: We are strongly committed to serving our community which will establish us as a leader in the independent study model. We set ourselves apart through expertise, parent support, and high academic achievement which will benefit our stakeholders.

3) Educational Philosophy and What it Means to be Educated in the 21st Century

The Charter School seeks to attract and serve a group of students who can benefit from instruction that is more freely scheduled, flexibly paced, individually targeted, and closely monitored than can occur in a traditional “brick and mortar” classroom. SOCS’s model is distinguishable from other independent study or self-directed learning models in that students benefit from a high level of personalized support from professional educators, a feature lacking in other virtual and independent study settings.

The Charter School believes that each student has unique needs and that educational success depends on personalizing learning and providing the appropriate high-quality resources, services, and support to meet those needs.

This learning climate is made possible by utilizing diverse curriculum options that are aligned to California’s academic content standards, including Common Core State Standards (“CCSS”), Next Generation Science Standards (“NGSS”), History-Social Science Framework, English Language Development (“ELD”) Standards, and the remaining State Content Standards (hereinafter, collectively, “State Standards”), and targeted to individual learner needs. Our curriculum is delivered through a personalized learning independent study model. The curriculum is designed to cover the full content in each core subject by the end of each academic year. However, the flexible pacing in our approach enables the student, under the guidance of the teacher, to spend more intensive time and effort in areas of need. This model allows teachers to better address each student’s unique learning and communication styles, cultivates independent thought, and offer alternative or supplemental learning options that prepare students for the real-life complexities of higher education or the job market in the 21st century.

SOCS’s educational model is intended to cultivate learning habits that keep the mind open, curious, and alert. An educated person in the 21st century is able to continuously learn, perceive opportunity, and adapt talents and skills to novel situations. These characteristics and habits reveal themselves when a person adapts learned capabilities to a job or career that did not exist when those capabilities were first formed. This dynamic demonstrates that the curious and open-minded are by nature lifelong learners. Our model engenders this mentality by enabling the student to interact with the curriculum in a manner that motivates him or her to pursue individual interests while proceeding through the required content.

SOCS positions its students for success by enabling students to learn at any time and place, and by deploying flexible learning, teaching, curricular, and staffing models that adapt to the uniqueness inherent in every student and learning situation. SOCS empowers students to take ownership of their education and develop not only knowledge, skills, and abilities, but also the confidence, creativity, and resourcefulness to deploy them adaptively in response to the challenges and opportunities of the 21st century.

4) WASC and Plan for Transferability of Courses

SOCS informs parents/guardians about the transferability of courses to other public high schools and how those courses meet college entrance requirements for the University of California and California State University through individual meetings with his/her assigned teacher,

parent/guardian information meetings and via the high school handbook that is provided to all high school students and parents/guardians. Teachers receive annual training in these requirements. SOCS is accredited by the Western Association of Schools and Colleges (“WASC”) until June 30, 2027, and will apply for continued accreditation at that time. SOCS offers a full complement of a-g courses approved by the University of California as well as National Collegiate Athletic Association (“NCAA”) approved courses for students who pursue athletics at the collegiate level.

5) Overview of School Program

The SOCS program serves students in TK-12th grade. Students in our program develop a personalized education plan with the support and guidance of their credentialed teacher and with the support of the Charter School’s leadership team. This plan is highly customizable and flexible in order to meet the unique needs of each student and family. The educational plan is supported through selecting curriculum, materials, and educational services that are tailored to that custom plan.

K-5 and 6-8 students are assigned a credentialed teacher in the designated grade bands who are trained in supporting the progress toward state standards utilizing a variety of learning styles and philosophies. The parent/guardian, teacher, and student develop a personalized plan that meets the student’s unique needs. Teachers are able to use instructional funds to select curriculum, educational materials, and tutoring options through our extensive vendor list, as well as attend live synchronous classes with Sage Oak teachers in a variety of different subject areas. Students may participate in extracurricular activities such as the arts and sports, as well as additional academic support through tutors and in-person support classes. The teacher ensures all materials and activities purchased with the Charter School’s funds support the student’s educational plan and are fiscally and legally sound. SOCS is committed to providing opportunities for our students to connect in the community and to broaden their learning through those community opportunities. A few examples of how this may be accomplished are through CCSS-aligned field trips, community events at parks, and an annual STEM day. We also have an all-virtual program where students participate in daily live instruction in all subject areas with a designated teacher and same-grade peers.

Students in grades 9-12 are assigned an education advisor who is specially trained in high school curriculum options, college and career readiness, and school-specific high school options leading to graduation and meeting their post-high school goals. In addition to weekly training meetings, and bi-annual in-service workshops, education advisors may attend the annual UC/CSU Counselor Conference, as well as online webinars offered by the College Board.

Our highly experienced secondary education department works with each student and parent/guardian individually to custom-build the student’s semester and four-year plan. Students have abundant opportunities to participate in co-curricular and extra-curricular options including high school career-oriented field trips, four-year and community college tours, and clubs such as yearbook, literary club, Spanish club, student council, and National Honor Society. We also offer regional social gatherings to facilitate community and team-building among high school students.

Secondary education staff work with students and education advisors to facilitate personalized career and educational planning through both individual and school-wide planning workshops focusing on college and career preparation. A college and career readiness course is required. Students are informed about the various paths to graduation and are offered support in reaching their highest potential.

SOCS maintains a UC a-g course list that will include the approved online courses from our vendors as well as our Charter School's own live synchronous classes, project-based and textbook-based courses. In addition to core courses, SOCS offers an array of electives reflecting a wide range of student interests including communications, social science, fine arts, languages other than English, computer skills, and career and technical education courses. SOCS also facilitates community college concurrent enrollment for qualified, interested students.

Education advisors encourage student achievement through mentoring and support. Education advisors personalize students' college and career readiness courses to meet their individual interests and goals. In addition, the secondary education department organizes college information sessions in the fall and in the spring. In the fall, these sessions are geared toward understanding the college application process. Eighth-grade high school transition sessions are held in the spring to assist in preparing students for 9th grade, and sessions are held for 11th-graders to guide them in planning their senior year.

6) Whom We Attempt to Educate

SOCS is open to all students in grades TK-12 in San Bernardino County, and its contiguous counties of Inyo, Kern, Los Angeles, Orange, and Riverside. SOCS is nonsectarian in its programs, admission policies, employment practices, and all other operations. SOCS does not charge tuition and does not discriminate against any student on the basis of legally protected characteristics.

SOCS seeks to serve any student who demonstrates an interest, desire, and aptitude for an independent study learning environment. These might be students who are high-performing or potentially so, but they find too much distraction or too little stimulation in the traditional classroom environment. Alternatively, these might be students who need more one-on-one support and will thrive working in the home with their parent/guardian supporting the day-to-day instruction. The Charter School's model also serves students who need an alternative to daily classroom attendance. These students may work during the day or may not be motivated to attend school on a full-time campus for many reasons. The SOCS model is designed to serve all of these students effectively through diverse curriculum options and dedicated, individualized teacher support.

SOCS serves students in grades TK through 12. The projected enrollment for the 2024-2025 school year is 3660 students. As the program grows and expands, we anticipate serving as many students as we can serve while maintaining a balanced budget.

7) Curriculum and Instructional Design

Student Information System

The Student Information System (“SIS”) keeps all student information and allows the Charter School to continually assess its educational program to make data-driven decisions relative to course offerings and student outreach. The SIS has a sophisticated reporting capability that all faculty and staff have access to at varying levels (access is granted depending on employee status and job needs). This system houses student information and records, employee information and records, grades and transcripts, and state testing information. The SIS self-reports relative to state reporting mandates such as CALPADS and is sophisticated and reliable.

In addition, the SIS provides the capability of making decisions about curriculum offerings and teacher assignments; determining correct student course placement; using state testing data for student placement and support needs; and tracking grades and progress toward graduation. SOCS strives to be a data-driven organization in order to make decisions that best serve student needs and help them become successful graduates of the Charter School.

Curriculum Overview

SOCS offers a wide and diverse range of curriculum offerings and provides students with many options and pathways to prepare them to meet their individual educational, personal, and post-high-school goals. In order to accomplish this, SOCS contracts with multiple curriculum vendors to offer the most up-to-date, quality curriculum possible. The curriculum is chosen by the parent/guardian, teacher, and student. SOCS families have access to the school’s student services department, which can provide additional support in making the most effective curriculum decisions and which also creates lists of curriculum to meet students’ various needs. Curriculum selection is based on State Standards, student’s learning style, student’s working level, and the educational philosophy being followed. The teachers have hundreds of options for curriculum, including the state-approved material list, as well as curriculum associated with various educational philosophies.

High School Curriculum

Core courses cover all the essential subjects within each of these academic areas: language arts, mathematics, history/social science, physical sciences, life sciences, visual and performing arts, and languages other than English. The Charter School also offers an array of electives reflecting a wide range of student interests, including communications and the professions (e.g., speech and communications, psychology), computer technology (e.g., computer applications, digital citizenship), and practical skills (e.g., health, career exploration). Qualified students are able to take concurrent enrollment courses at community colleges.

SOCS’s high school curriculum options are thoroughly vetted by our high school leadership team and staff of qualified single-subject teachers to ensure that each high school student receives a high-quality and rigorous State Standards-based education. SOCS offers live online instruction in combination with either an award-winning digital curriculum or standards-based, textbook curriculum. In addition, high school students have additional curriculum options through our collection of approved web-based curriculum community providers such as Apex, Blue Tent, High

School Math Live, and Williamsburg. In-person community providers that offer the opportunity for hands-on enrichment are also paired with an in-house syllabus course taught by a single subject teacher to allow for both social engagement and rigorous content oversight.

SOCS's graduation requirements include rigorous university preparatory courses in English, mathematics, science, social science, language other than English, and visual and performing arts, and the curriculum challenges each student to think beyond the subject matter. SOCS's graduation requirements exceed California Education Code requirements, and students are counseled on how to meet additional college or career requirements based on their post-secondary educational goals. Sage Oak curriculum meets or exceeds UC/CSU a-g course requirements.

In addition to student planning sessions, the secondary education department provides staff training on meeting high school graduation requirements, meeting college entrance requirements, and personalized career preparation.

SOCS provides staff and students with a recommended course sequence. SOCS students may choose an alternative sequence that suits their personalized graduation plan as long as graduation requirements are met and the courses are aligned to State Standards.

Attendance Tracking

Attendance policies and practices align with applicable law. Attendance is claimed using a two faceted approach. In order to claim attendance, the student must engage in learning for each day claimed ("daily engagement") and additionally must complete the learning that was assigned by the teacher of record for the given learning period ("time value of work product"). Each learning period, the teacher will review the student's completed assignments and will assign the correlating amount of attendance so long as the student additionally engaged daily in an educational activity. The teacher will assign learning and evaluate that learning based on individual ability and needs of the student. The teacher will work with the parent/guardian and student to plan out the appropriate amount of work for both attendance purposes and in order to support the student in meeting or exceeding standards and achieving personal goals.

6) Plan for Students Who Are Academically Low Achieving

Identifying and Understanding Low Achievers

SOCS's instructional team is prepared to work with a diverse student population and to focus intensively on those who struggle academically and perform below expectations. SOCS understands that students can find themselves struggling for a variety of reasons. Some have difficulty staying on task; others have become accustomed and resigned to lowered expectations based on a pattern of past setbacks. Some have difficulty with one subject area but not another. Some have trouble working in the early morning or after lunch. Every student is different, and every struggling student struggles uniquely. This is, in fact, one of the major reasons why some students choose virtual/independent study education.

These students are identified through past grades and state test scores; discussions with

parents/guardians and previous counselors; IEPs; writing samples; and the results of diagnostic skills assessments that may be given to incoming students. Using this information, SOCS teachers and counselors can create a pathway to success for each student. This involves not only appropriate course placement but also accommodations and adaptations that teachers make to the curriculum and their instructional approach to meet the needs of each individual student.

Structural Elements and Strategic Responses for Raising Student Achievement Levels

To meet the challenges faced by struggling students, teachers offer continuous motivation and support, seek ways to engage students in meaningful learning, and work one-on-one with students and parents/guardians to ensure the educational plan is working to achieve the student's goals. These include individual student/teacher calls, teacher/parent/guardian phone/virtual video conferences, student study team phone/virtual conferences (these include the student and his/her parent/guardian), and in-person meetings.

The flexible nature of our pacing and curriculum allow teachers to provide remediation, support, and additional challenge wherever it is needed during the year, proactively supporting students and addressing individual needs before more intensive intervention efforts are required.

While all students can benefit from the flexible pacing inherent in the Charter School's program, struggling students in particular will benefit from a curriculum that does not mandate that all students demonstrate their knowledge and skills in identical ways or at identical times.

The program is designed around a wide variety of assignments that afford students varied ways to demonstrate mastery of content. These include, but are not limited to, verbal discussions, written and verbal course assignments, practice assignments, quizzes, journals, essays, creative writing papers, research projects, group projects, exams, reviews/case studies, and portfolios. Additionally, prep and/or remediation will be available to students in order to help them achieve proficiency on all CAASPP assessments.

SOCS uses a Multi-Tiered System of Support ("MTSS") to ensure equitable access and opportunity for all students to succeed both behaviorally and academically.

Behavioral MTSS

The Behavioral MTSS is a tiered systems approach of increasingly intensive counseling interventions to facilitate effective implementation of activities and services that focus on core instruction and differentiated interventions to support the success of all students.

The Three Tiered Behavioral Model

Tier One

Information and curriculum shared with all students that is preventative in nature. Resources are distributed through Sage News, staff email, and future webinars/ virtual meetings.

Tier Two

Additional support such as individual counseling and supplemental interventions are available for students identified through the use of data identifiers/indicators.

Tier Three

Students with the highest level of need are provided referrals and resources to be seen and evaluated by licensed community-based professionals for intensive therapeutic interventions.

Academic MTSS

Sage Oak uses the three tier model of Response to Intervention (“RTI”). Students are identified through formative and summative measures that occur as frequently as necessary.

The Three Tiered Academic Model

Tier One (Prevention) At Tier 1, school-wide prevention efforts are established to promote learning for all students, anticipating that most students will respond to these strategies and will not require additional intervention. SOCS provides high-quality, standards-based, instruction in their learning environment from teachers, parents/guardians, and/or community providers, who have high academic and behavioral expectations. The virtual program affords students regular monitoring of progress and interaction with highly qualified teachers. The independent study model lends itself greatly to the differentiated instructional model in that the parent/guardian and teacher(s) work together to customize each student’s educational plan, including curriculum selection and instructional techniques.

Tier Two (Selected Structured Intervention) At Tier 2, strategic intervention is established for students who are identified as being at risk of experiencing problems. For example, when school-wide screening reveals that some students are at risk, supplemental reading support and/or tutoring would be provided and encouraged. During Tier Two students will be taken through our intervention process where we will look at the student as a whole. During this process, we will create intervention strategies, as well as create goals and a timeline for improvement. If the goals have not been reached during the set timeline, then the student is referred to a more in depth Student Study Team (“SST”).

Tier Three (Intensive Intervention) At Tier 3, more intensive and possibly individual intervention is provided for students who continue to be at risk. At this level, a student may be referred for evaluation and consideration of whether the student qualifies for Special Education services according to the Individuals with Disabilities Education Improvement Act.

The following core components are key aspects of the MTSS framework at SOCS:

- All students receive high-quality, standards-based, culturally and linguistically relevant curriculum in their learning environment from teachers/parents/guardians, who have high academic and behavioral expectations. The Sage Oak model lends itself greatly to the differentiated instructional model in that the parent/guardian and teacher work together to customize each student’s educational plan including curriculum and instructional

techniques. The teacher works with the parent/guardian to align the educational plan to CCSS and ensure high academic rigor and expected progress.

- MTSS principles promote continuous improvement processes at all levels of the system. Collaborative restructuring efforts made to align the RTI process, CCSS, identify key initiatives, collect, analyze, review data, implement supports and strategies based on data are then refined as necessary to sustain effective processes. In order to ensure continuous improvement at all levels, key members of the Sage Oak staff meet regularly to evaluate the program.
- SOCS staff collaborate to create an integrated data collection system that includes assessments such as state tests, universal screening, diagnostics, progress monitoring, and teacher observations to inform decisions about tiered support placement, as well as data collection methods such as parent/guardian surveys for continuous systemic improvement. Sage Oak teachers use state scores, i-Ready assessment scores, full body of work, and observation to determine if RTI support is needed.
- SOCS staff work collaboratively with parents/guardians to assist in the development of proper behavior of the student in the learning environment. As the students are in a home-based learning environment, parents/guardians may experience behavioral issues that are negatively impacting the students' learning. The parent and teacher can brainstorm various behavior plans to help the student and parent.

SOCS also provides an RTI Program, as part of MTSS, where students, parents/guardians, and educators can come together to evaluate a student's performance and create a detailed, intervention-driven educational plan to improve the student's academic progress.

Our goal is to provide early intervention for struggling students. The RTI process is in connection with the general education plan, not special education. It seeks to provide a structured, communicative forum to address student needs. RTI plays a vital role in creating a high-achieving school as expressed in the following goals: 1) enables parents/guardians to teach students more effectively, 2) enables students to achieve standards, acquire academic and social competencies, become independent learners equipped for life's challenges, and 3) create a collaborative culture among all the involved parties.

The primary function of the RTI process is to provide a routine, cohesive, and focused team where specific student struggles can be addressed and resolved.

The process begins when a teacher or parent makes a request for assistance. The teacher will complete a Student Study Team meeting request. At this meeting, the team will focus on brainstorming, evaluating, and selecting appropriate interventions through the creation of an action plan. A sufficient period of time will be determined to implement the selected interventions, whereupon a follow-up meeting will take place to discuss the results of these strategies. This problem-solving process continues until the intervention(s) is successful, or until a determination is made that a more in-depth evaluation for special services is required.

The RTI process is not a substitute for a 504 Plan, nor does it determine eligibility for 504 accommodations. As a result of the RTI process, a referral may be made to the 504 team if they suspect that a student has a medical diagnosis that substantially limits or prohibits their participation in a major life activity. If a student has an existing 504 Plan, the teacher will follow the appropriate procedure listed in the Teacher Manual.

The RTI process addresses general education strategies and interventions in response to a teacher/parent concern. It does not prevent or impede a direct referral to the SPED Department by a parent/guardian. It makes recommendations regarding the full continuum of interventions and services available at SOCS, including the provision of information to teachers and parents/guardians regarding the process of referring a student to the SPED Department. It is important to recognize the general education ownership of this process, while equally important to emphasize that the RTI process cannot be a substitute for special education services.

Teachers will request an SST meeting when it becomes apparent that a student is not responding to standard teaching and the parent/guardian's attempt to implement different strategies independently has been unsuccessful. Once the teacher and parent/guardian have gone through both Tier 1 and Tier 2, and it has been determined that a student is at Tier 3, a meeting should be scheduled.

Student Study Team

A Student Study Team, including parents/guardians, teachers, and other Charter School personnel or interested persons, uses a systematic problem-solving approach to assist students with any concerns that are interfering with success. The SST clarifies problems and concerns, develops strategies and organizes resources, provides a system for school accountability, and serves to assist and counsel the parent/guardian, teacher, and student. An SST is a general education function. All students can benefit from an SST, including but not limited to those students achieving below grade level, those who are achieving above grade level and require greater challenge, and students who have experienced emotional trauma, behavioral issues, or language issues. The SST meetings are used in our MTSS/RTI program as a Tier 2 and Tier 3 support.

Anyone who has a concern for a student can refer that student to the SST for consideration. Anyone connected with the student can be included in the SST to provide information about the student, including strengths, concerns, and strategies that have been used in the past. Team members may include but are not limited to teachers, parents/guardians, counselors, doctors, administration, social workers, and law enforcement. The meeting is designed to bring out the best in the people involved.

Our twelve SST meeting steps include:

1. Team members introduce themselves and their roles.
2. Purpose and process of the meeting are stated.
3. Strengths are identified.
4. Concerns are discussed, clarified, and listed.
5. Assessment scores and report cards are reviewed.

6. Pertinent information and modifications are listed.
7. Concerns are synthesized; one or two are chosen for focus.
8. Strategies to address concerns are brainstormed.
9. Team chooses best strategies to carry into actions.
10. A clear goal is defined and agreed upon. Individuals make commitments to actions.
11. Person responsible and timelines for actions are recorded.
12. Follow-up date is set.

After implementation of an SST plan and follow-up, the plan will be further reviewed/revised to address concerns that have not been adequately addressed and/or effectively resolved. In addition, a referral for special education assessment might be deemed appropriate through the SST process.

Credit Recovery

SOCS's independent study program offers a credit recovery program for students. SOCS credit recovery students have the potential to recover credits depending on how quickly courses are completed. Students receive personalized support from the secondary education team and/or teacher which includes weekly check-ins via email or phone, a credit recovery plan of courses the student needs to retake, and encouragement and pacing assistance to keep students on pace and moving through the courses. Teachers are available to support students in their classes by phone, email, and the virtual classroom. They may provide students with recorded live sessions, tutoring, and any other support they need to be successful in their classes.

7) Plan for Students Who Are Academically High Achieving

High-achieving students are identified via the same process of investigation, observation, and analysis used to identify low-achieving students, as stated above.

SOCS will offer individualized support for high-achieving students such as differentiation, one-on-one instruction, and access to higher-level materials. SOCS also offers a gifted and talented program for our advanced learners which includes access to additional support by trained professionals in gifted education, specialty academic classes, and learning experiences geared specifically for the learner.

One of the benefits of our model is that it allows high-achieving students to work at an accelerated pace and to go in further depth as needed. Students can customize their education and accelerate in one subject area and not others depending on their individual achievement levels and needs.

High-achieving students are afforded opportunities that foster the student's academic success and challenge the student further. SOCS offers Advanced Placement ("AP"), the College-Level Examination Program ("CLEP"), honors courses, and community college dual enrollment. In addition, qualified middle school students may take high school and community college courses. These students are also encouraged to participate in supplemental programs such as the National Honor Society. Secondary education staff offers guidance through the college admission process, creating a four-year plan, concurrent enrollment, and assistance with college application process

during senior year. Exceptional students who wish to accelerate through the curriculum and graduate early will have an opportunity to do so with secondary education leadership and teacher approval.

8) Plan for English Learners

SOCS has developed an English Learner Master Plan to serve English Learner (“EL”) students, including long-term English Learners (“LTELs”) or English Learners at risk of becoming LTELs, which addresses their needs, meets all state and federal mandates, and, which has a goal of exiting students from EL status. SOCS ELPAC testing will be facilitated and proctored by trained, qualified members of staff. SOCS will work with teachers to provide EL support in the general education setting as outlined in the charter’s EL Master Plan. SOCS will meet all applicable legal requirements for ELs as they pertain to annual notification to parents, student identification, placement, program options, EL and core content instruction, teacher qualifications and training, reclassification to fluent English proficient status, monitoring and evaluating program effectiveness, and standardized testing requirements.

EL students that are at risk for becoming long-term EL students, will be monitored and given extra targeted support services.

Identifying Students as EL

EL students are targeted for ELPAC initial assessment testing when the Home Language Survey, administered on enrollment forms, indicates that their primary home language is a language other than English.

- All students identified as ELs via the home language survey will take the ELPAC initial assessment within 30 calendar days of enrollment if they have not previously been identified as an English Learner by a California public school or for whom there is no record of results from an administration of an English language proficiency test.
- All EL students will take the ELPAC summative assessment every year during the testing window until reclassified as fluent English proficient.
- Parents/guardians will be notified of ELPAC results within 30 days of when SOCS receives the testing results. The ELPAC shall be used to fulfill the requirements under the Every Student Succeeds Act for annual English proficiency testing.
- All SOCS students are in an English Language Mainstream academic program with an EL Support Course. The mainstream curriculum is supported by CLAD certified teachers and includes vocabulary, visual, and thematic-based support. EL students are accommodated within this curriculum by providing multiple opportunities to demonstrate mastery on all assessments, including writing assignments.

Criteria for Reclassifying EL Students

The following criteria are used in tandem to determine whether to reclassify a student as proficient in English (“RFEP”):

- Summative ELPAC Overall Score
- Teacher Evaluation

- Parent Consultation
- Basic skills relative to English Proficient students including standards-based report cards, local assessments, and CAASPP/Smarter Balanced assessments.

For ELs with significant cognitive disabilities, SOCS also has additional reclassification criteria under “special circumstances”, who may be reclassified upon agreement from the IEP team, when appropriate.

EL Support Class/Curriculum

The EL support class/curriculum covers the state ELD Standards and focus on building skills in academic vocabulary and reading/writing across the curriculum. High school students have the option of receiving elective credit for the course. The course aids EL students by providing scaffolding to build skills in academic reading and writing in all content area courses. Students are placed in the course based on their status as an EL student until they have been reclassified. English Language core courses are chosen based on academic level and elective courses are chosen based on student interest and need (i.e. the EL support course).

- All units include vocabulary and grammar-building components and targeted reading/writing strategies across content areas.
- Each individual unit is centered around a specific theme and a specific reading/writing strategy.
- EL students will be monitored relative to performance in the EL support class and progress in all academic courses. SOCS will conference with core and support teachers on an ongoing basis.
- All EL students will be contacted regularly for check-in and progress monitoring.
- Parents/guardians will be included in all correspondence regarding student progress.

9) Plan for Special Education

SOCS understands that the Charter School has the obligation to serve students with exceptional needs and that the Charter School, pursuant to applicable state and federal law, must ensure that all of its students have access to a free and appropriate public education (“FAPE”) in the least restrictive environment (“LRE”). The Charter School shall comply with all applicable state and federal laws in serving students with disabilities, including, but not limited to, Section 504 of the Rehabilitation Act (“Section 504”), the Americans with Disabilities Act (“ADA”) and the Individuals with Disabilities Education Improvement Act (“IDEA”).

SOCS is its own local educational agency (“LEA”) and is a member of Sonoma County Charter Special Education Local Plan Area (“SELPA”) in accordance with Education Code Section 47641(a). The Charter School shall provide the District evidence of membership. As an LEA member of the SELPA, the Charter School shall receive state and federal revenues directly, in accordance with the SELPA’s allocation plan. A change in LEA status or SELPA membership shall not require a material revision of this charter.

The Charter School shall comply with all state and federal laws related to the provision of special education instruction and related services and all SELPA policies and procedures; and shall utilize

appropriate SELPA forms.

The Charter School may seek resources and services (e.g. speech, occupational therapy, adapted P.E., nursing, and transportation) from the SELPA, subject to SELPA approval and availability. The Charter School may also provide related services by hiring credentialed or licensed providers through private agencies or independent contractors. All contracted vendors will be non-public agencies (NPAs) to comply with that regulation as set forth.

The Charter School shall be solely responsible for its compliance with Section 504 and the ADA. The facilities to be utilized by the Charter School shall be accessible for all students with disabilities.

SOCS anticipates enrolling students with IEPs or enrolling students who may require testing for appropriate placement and possible services. SOCS will work proactively and cooperatively with families, the teaching staff, and the District to adhere to state and federal mandates in servicing Special Education students including, but not limited to: testing; creating and updating IEPs; special services as provided by outside providers or by the District, etc. We will also ensure that:

- We employ admissions and enrollment practices that are non-discriminatory toward students with IEPs.
- Students with special education services are under the guidance of and receive support from the Charter School's Special Education Case Managers.
- Special Education Case Managers ensure that the staff working with students with IEPs are trained in how to fulfill the requirements of the IEPs and in how to appropriately support students with special education services.
- In working with students with special education services, our Charter School is the least restrictive environment (LRE) and an appropriate placement for student as dictated by law.
- SOCS requests and obtains student's cumulative files and other documents in a timely fashion.
- SOCS reviews student assessment data, including but not limited to state-mandated testing, to identify students who may be falling behind expectations in their academic progress and in need of additional support or services.

Services for Students under the "IDEA"

The following description regarding how special education and related services shall be provided and funded is being proposed by the Charter School for the sole purpose of providing a reasonably comprehensive description of the special education program in the Charter Petition, and is not binding on the District. The specific manner in which special education and related services shall be provided and funded shall be set forth in a Memorandum of Understanding ("MOU"), delineating the respective responsibilities of the Charter School and the SELPA.

The Charter School shall provide special education instruction and related services in accordance with the IDEA, Education Code requirements, and applicable policies and practices of the SELPA.

The Charter School shall provide special education services for students with an IEP enrolled in the

Charter School. The Charter School shall follow SELPA policies and procedures and shall utilize SELPA forms in seeking out and identifying and serving students who may qualify for special education programs and services and for responding to record requests and parent/guardian complaints, and maintaining the confidentiality of student records.

The Charter School agrees to promptly respond to all District or SELPA inquiries, to comply with reasonable District or SELPA directives, and to allow the District or SELPA access to Charter School students, staff, facilities, equipment and records as required or imposed by law.

Staffing

All special education services at the Charter School shall be delivered by individuals or agencies qualified to provide special education services as required by the California Education Code and the IDEA. Charter School staff shall participate in in-house District and/or SELPA in-service training relating to special education.

The Charter School shall be responsible for the hiring, training, and employment of site staff necessary to provide special education services to its students, including, without limitation, special education teachers, paraprofessionals, speech and language pathologists and occupational therapists. The Charter School shall ensure that all special education staff hired or contracted by the Charter School is qualified pursuant to SELPA policies, as well as meet all legal requirements. The Charter School shall be responsible for the hiring, training, and employment of itinerant staff necessary to provide special education services to Charter School students, including, without limitation, speech pathologists, occupational therapists, behavioral therapists, and psychologists.

Child Find

SOCS shall have the responsibility to identify, refer, and work cooperatively in locating students who have or may have exceptional needs that qualify them to receive special education services. SOCS will implement SELPA policies and procedures to ensure timely identification and referral of students who have, or may have, such exceptional needs. A student shall be referred for special education after the resources of the regular education program have been considered and, where appropriate, utilized.

SOCS will follow SELPA child-find procedures to identify all students who may require assessment to consider special education eligibility and special education and related services in the case that general education interventions do not provide a free appropriate public education to the student in question.

Students possibly in need of special education will be screened from already available data (i.e., the local assessment, teacher observations, grades, etc.) regarding the student's progress or lack of progress within the general program. SOCS shall follow the multi-tiered system of support to integrate academic behavioral instruction an integration provided to students in varying degrees based on need. Both staff and parents/guardians will be trained in this process to increase its effectiveness. If the process finds that the plan is not sufficient to meet the student's needs, it may

refer a student for assessment through the provisions of a Section 504 Plan, if appropriate, or recommend that student for a formal special education assessment.

Special education and related services are provided at no cost to students.

Referral and Assessment

SOCS students who are referred for special education testing after admission to the program will be tested using appropriate assessments by SOCS special education case managers or properly credentialed contracted vendors. Students identified as qualifying for services will receive special education and/or related services under the terms of applicable special education law and as specified by the resulting Individualized Education Program. The services may or may not be supplied directly by SOCS staff dependent on student needs, the terms of a Memorandum of Understanding (“MOU”) between SOCS and the District if any, and /or the availability of services which may be provided by outside vendors. If this assessment identifies that the student has exceptional needs and requires special education and/or related services under the terms of applicable special education law, SOCS will convene and conduct IEP team meetings.

Assessments

The term “assessments” shall have the same meaning as the term “evaluation” in the IDEA, as provided in Section 1414, Title 20 of the United States Code. The Charter School shall determine what assessments, if any, are necessary and arrange for such assessments for referred or eligible students in accordance with applicable law. The Charter School shall obtain parent/guardian consent to assess Charter School students.

Individualized Education Programs and Service Delivery

SOCS plans and conducts the IEP team meetings and will designate staffing and other resources needed to implement the special education and related services called for by the IEP. Student progress toward the goals specified in the IEP are monitored regularly, and formally reviewed by the IEP team on at least an annual basis.

Each student’s IEP requires different kinds of accommodations and modifications for instruction and services; therefore, the educational strategies of the IEP will be built around the student’s needs. If a student’s IEP team determines that the student requires placement outside of a general education classroom, SOCS will provide the necessary placement and/or services. The instruction outlined in each student’s IEP will be delivered by personnel qualified to do so.

Interim and Initial Placements of New Charter School Students

The Charter School shall comply with Education Code Section 56325 with regard to students transferring into the Charter School within the academic school year. In accordance with Education Code Section 56325(a)(1), for students who enroll in the Charter School from another school district within the State, but outside of the SELPA with a current IEP within the same academic year, the Charter School shall provide the student with a free appropriate public education,

including services comparable to those described in the previously approved IEP, in consultation with the parent/guardian, for a period not to exceed thirty (30) days, by which time the Charter School shall adopt the previously approved IEP or shall develop, adopt, and implement a new IEP that is consistent with federal and state law.

In accordance with Education Code Section 56325(a)(2), in the case of an individual with exceptional needs who has an IEP and transfers into the Charter School from a district-operated program under the same special education local plan area of the Charter School within the same academic year, the Charter School shall continue, without delay, to provide services comparable to those described in the existing approved IEP, unless the parent/guardian and the Charter School agree to develop, adopt, and implement a new IEP that is consistent with federal and state law.

For students transferring to the Charter School with an IEP from outside of California during the same academic year, the Charter School shall provide the student with a free appropriate public education, including services comparable to those described in the previously approved IEP in consultation with the parents/guardians, until the Charter School conducts an assessment pursuant to paragraph (1) of subsection (a) of Section 1414 of Title 20 of the United States Code, if determined to be necessary by the Charter School, and develops a new IEP, if appropriate that is consistent with federal and state law.

Non-Public Placements/Non-Public Agencies

The Charter School shall be solely responsible for selecting, contracting with, and overseeing all non-public schools and non-public agencies used to serve special education students.

Non-Discrimination

It is understood and agreed that all children shall have access to the Charter School and no student shall be denied admission nor counseled out of the Charter School due to the nature, extent, or severity of his/her disability or due to the student's request for, or actual need for special education services.

Due Process

Concerns or disagreements raised by parents/guardians will be acknowledged by the Charter School within five days. SOCS will work to arrange a meeting with the parents/guardians to seek resolution of the disagreement. If a disagreement or concern persists, parents/guardians have the right to initiate a due process hearing to challenge a decision regarding the identification, evaluation, or educational placement of their child.

SOCS acknowledges its responsibility to resolve disputes or defend due process complaints arising as a result of SOCS's alleged failure to provide FAPE to students enrolled in the Charter School. SOCS may also initiate a due process hearing or request for mediation with respect to a student enrolled in SOCS if it determines such action is legally necessary or advisable.

SELPA Representation

The Charter School understands that it shall represent itself at all SELPA meetings.

Funding

The Charter School understands that it shall be subject to the allocation plan of the SELPA.

Section 504 of the Rehabilitation Act/ADA

SOCS recognizes its legal responsibility to ensure that no qualified person with a disability shall, on the basis of disability, be excluded from participation, be denied the benefits of, or otherwise be subjected to discrimination under any program of SOCS. SOCS is committed to protecting all students from discrimination under state and federal law. SOCS will ensure all students who have a physical or mental impairment that substantially limits one or more major life activities, have a record of such an impairment, or are regarded as having such an impairment, are eligible for protections under Section 504 and the Americans with Disabilities Act. SOCS will provide a free appropriate public education ("FAPE") to those students through the creation and implementation of a Section 504 Plan. SOCS shall be solely responsible for its compliance with Section 504 and the ADA. All facilities of SOCS shall be accessible for all students with disabilities in accordance with the ADA.

The 504 Plan Process: A 504 team will be assembled by the Superintendent, as needed and will include the parent/guardian, the student (where appropriate), and other qualified persons knowledgeable about the student, the meaning of the evaluation data, placement options, and the legal requirements for LRE.

The 504 team will review the student's existing records, including academic, social and behavioral records and is responsible for making a determination as to whether an evaluation for 504 services is appropriate. If the student has already been evaluated under the IDEA, those evaluations may be used to help determine eligibility under Section 504. The student evaluation will be carried out by the 504 team who will evaluate the nature of the student's disability and the impact upon the student's education.

This evaluation will include consideration of any behaviors that interfere with regular participation in the educational program and/or activities. The 504 team will consider the following information in its evaluation:

- Tests and other evaluation materials that have been validated for the specific purpose for which they are used and are administered by trained personnel.
- Tests and other evaluation materials include those tailored to assess specific areas of educational need and not merely those which are designed to provide a single general intelligence quotient.
- Tests are selected and administered so as to ensure that when a test is administered to a student with impaired sensory, manual or speaking skills, the test results accurately reflect the student's aptitude or achievement level or whatever other factor the test purports to

measure rather than reflecting the student's impaired sensory, manual or speaking skills.

The final determination of whether the student will or will not be identified as a person with a disability is made by the 504 team in writing and notice given in writing to the parent/guardian of the student in their primary language along with the procedural safeguards available to them. If during the evaluation, the 504 team obtains information indicating possible eligibility of the student for special education per the IDEA, a referral for special education assessment will be made by the 504 team.

If the student is found by the 504 team to have a disability under Section 504, the 504 team will be responsible for determining what, if any, accommodations or services are needed to ensure that the student receives a FAPE.

In developing the 504 Plan, the 504 team shall consider all relevant information utilized during the evaluation of the student, drawing upon a variety of sources, including, but not limited to, assessments conducted by the SOCS professional staff. The parents/guardians shall be invited to participate in 504 team meetings where program accommodations, modifications or services for the student will be determined and they will be given an opportunity to examine in advance all relevant records. The 504 Plan shall describe the Section 504 disability and any program accommodations, modifications or services that may be necessary. In considering the 504 Plan, a student with a disability requiring program modification shall be placed in the least restrictive environment, with students who are not disabled to the extent appropriate to the individual needs of the student with a disability.

All 504 team participants, parents/guardians, and guardians, teachers and any other participants in the student's education, including substitutes and tutors, must have a copy of each student's 504 Plan. The SOCS Superintendent will ensure that teachers include 504 Plans with lesson plans for short-term substitutes and that he/she review the 504 Plan with a long-term substitute. A copy of the 504 Plan shall be maintained in the student's file. Each student's 504 Plan will be reviewed at least once per year to determine the appropriateness of the Plan, and continued eligibility or readiness to discontinue the 504 Plan.

10) Achievement of All Students

We will improve the academic achievement of all students, including English Learners, homeless and foster youth, ethnic subgroups, socioeconomically disadvantaged youth, and students with disabilities. This will be accomplished through effective instruction, a challenging and engaging curriculum and aligned assessments in language arts and mathematics. We will implement the following, as well as track data of the subgroups to ensure goals are being met:

1. Evaluate students' levels of academic performance based on local assessment results and provide targeted interventions such as: meeting with the guidance director and/or curriculum director, one-on-one and small group tutoring, access to the local assessment's targeted curriculum program, time management training with student/parent/guardian. Departments will collaborate to streamline the intervention process and to measure its effectiveness.

2. Monitor low-income students, homeless students, foster youth, English learners, ethnic subgroups, and students with disabilities for proficiency on state and local assessments to review student learner outcomes to ensure academic success or refer to the RTI, SST or IEP team.
3. Provide personalized access to materials and/or learning experiences that are aligned to the Common Core State Standards through multiple channels assisting students in completing standards-aligned content:
 - Online courses, credit recovery, core programs
 - Supplemental curriculum and materials supporting common core standards
 - Extended school year
 - Digital curriculum aligned to the Common Core State Standards
 - Service vendors offering educational opportunities across geographical area
4. Provide professional development and ongoing trainings and discussions on the creation and use of rubrics and student academic achievement data to inform instruction and identifying effective targeted interventions for students struggling to meet grade level proficiency will be planned and provided.
5. Provide teacher and parent/guardian training, learning opportunities, and workshops on a variety of topics; for example: teaching students with disabilities, English learner master plan, English learner progress and reclassification, SDAIE strategies, literacy at home, foster and homeless youth, and Common Core State Standards.
6. Ensure all students have opportunities for intensive CAASPP preparation, specifically low income, homeless, English learners, foster youth, and students with disabilities
7. Develop a comprehensive college and career readiness program for middle and high school students that helps align student strengths and interests to post-secondary goals; increase Career Technical Education opportunities to prepare students for the 21st century workforce and global competencies. This program will be available and accessible to all student subgroups.

Charter School Goals and Actions to Achieve the Eight State Priorities

Pursuant to Education Code Sections 47605(c)(5)(A)(ii) and 47605(c)(5)(B), a reasonably comprehensive description of the Charter School's annual goals and actions, both schoolwide and for each subgroup of pupils, to achieve the Eight State Priorities as described in Education Code Section 52060(d), can be found in the Charter School's Local Control and Accountability Plan ("LCAP"). Each of these goals addresses the unique needs of all students attending the Charter School, including our numerically significant student subgroups. The metrics associated with these goals help the Charter School to ensure that these specific subgroups are making satisfactory progress, and are provided with necessary additional support made possible by additional funds from the Local Control Funding Formula.

The current LCAP is on file with the District and is also available on our website at www.sageoak.education and as Exhibit A. The Charter School shall annually update and develop

the LCAP in accordance with Education Code Section 47606.5 and shall use the LCAP template adopted by the State Board of Education. The Charter School reserves the right to establish additional and/or amend school-specific goals and corresponding assessments throughout the duration of the charter term through the annual LCAP update. The Charter School shall submit the LCAP to the District and County Superintendent of Schools annually on or before July 1, as required by Education Code Section 47604.33.

The LCAP and any revisions necessary to implement the LCAP shall not be considered a material revision to the charter, and shall be maintained by the Charter School at the school site.

ELEMENT 2: MEASURABLE STUDENT OUTCOMES

Governing Law: The measurable student outcomes identified for use by the charter school. "Pupil outcomes," for purposes of this part, means the extent to which all pupils of the charter school demonstrate that they have attained the skills, knowledge, and attitudes specified as goals in the charter school's educational program. Pupil outcomes shall include outcomes that address increases in pupil academic achievement both schoolwide and for all pupil subgroups served by the charter school, as that term is defined in subdivision (a) of Section 52052. The pupil outcomes shall align with the state priorities, as described in subdivision (d) of Section 52060, that apply for the grade levels served by the charter school." – California Education Code Section 47605(c)(5)(B)

High School Graduation Requirements

SOCS's graduation requirements include rigorous traditional university preparatory courses in English, mathematics, science, social science, language other than English, and visual and performing arts and; however, the curriculum courses will be provided in a manner that challenges each student to think beyond the subject matter that is presented and continually place new information in the context of their own knowledge base. SOCS's graduation requirements exceed the Education Code requirements applicable to non-charter public schools, and students are counseled on how to meet additional college or career requirements based on their post-secondary educational college goals. Sage Oak curriculum also meets or exceeds UC/CSU a-g course requirements.

SOCS has configured its minimum course completion requirements and its credit award policy so as to fulfill the high school graduation requirements of the District. Consistent with California law, the Charter School prescribes completion of the following, at a minimum**:

- Four courses in English (English I, II, III, IV)
- Two courses in mathematics, with one year of Algebra I mandatory*
- Two courses in science
- Three courses in social studies (including United States history and geography; world history, culture, and geography; a one-semester course in American government and civics, and a one-semester course in economics)
- One course in visual or performing arts or language other than English
- Two courses in physical education, unless the student has been exempted

* At least one course of the mathematics requirement shall be fulfilled by completion of Algebra I

coursework.

** Students will be advised that minimum graduation requirements do not meet UC entrance requirements.

Credit and Graduation Requirements

SOCS awards five credits per course, per semester. 220 credits are required to graduate. Students are eligible for a diploma when all requirements have been met. Diploma requirements are as follows:

GRADUATION REQUIREMENTS	CREDITS
<i>Required:</i>	
English	40
Mathematics	30
Life Science	10
Physical Science	10
Visual/Performing Arts	10
World History	10
American History	10
American Government	5
Economics	5
Language Other Than English (LOTE)	20
College & Career Exploration	5
Electives	65

School-Wide Goals

- **Goal One:** We will improve the academic achievement of all students through effective instruction, a challenging and engaging curriculum and aligned assessments in language arts and mathematics.
- **Goal Two:** We will promote high daily attendance and a positive school climate by providing high-quality teachers, best practice, and interventions to ensure student success
- **Goal Three:** We will establish connections and partnerships with our families and community to increase engagement, involvement, ensure the safety and satisfaction to support student learning and achievement.
- **Goal Four:** We will ensure that students are on-track to graduate from high school and have access to College and Career Technical Education.

ELEMENT 3: METHODS OF MEASUREMENT

Governing Law: The method by which pupil progress in meeting those pupil outcomes is

measured. To the extent practicable, the method for measuring pupil outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card. – California Education Code Section 47605(c)(5)(C)

1) Methods of Assessment

SOCS, like other charter and non-charter public schools, adheres to the tenets of the state accountability system. Using data from the statewide assessments and local assessments, SOCS discerns which numerically significant subgroups are not achieving growth target goals. Students identified as needing support to achieve proficient or advanced levels of achievement on assessments receive additional individualized assistance, and, where appropriate, tutoring, remedial instruction, and other intensive interventions. To the extent practicable, the method for measuring student outcomes for state priorities shall be consistent with the way information is reported on a school accountability report card.

Academic performance is assessed through graded lesson assignments, unit and module assignments, unit tests, course final exams, teacher observation, and annual statewide testing to include grade-specific Smarter Balanced Assessment Consortium (“SBAC”) assessments and California Science Test (“CAST”) for all applicable grade level students. Annual ELPAC assessments will be reviewed for designated EL students and annual progress towards IEP goals will be analyzed and updated for special education students.

Repeating a Course

Courses that may be repeated for credit will be listed in the course description. Courses in which grades of a D/F are earned may be repeated. The highest grade will be used in the GPA calculation. UC only allows a course to be repeated one time for grade replacement.

Transfer Credits

Transfer credits are awarded on a case-by-case basis. Official transcripts are required in order to award credit. Transcript analysis may require research and contact with previous institutions to determine eligibility of transfer credits. International records may require translation and/or evaluation prior to being considered for transfer credits.

Transcripts

Official transcripts should be requested from the student's counselor at least two weeks prior to deadlines.

Grade Level

Elementary and middle school students in TK-8 are assigned a grade level based on the year of TK or K entry. High School students are assigned a grade level based on the year of 9th grade entry. Regardless of credit deficiency, students will be promoted to the next grade and given an

opportunity to remediate credits in hopes that the student will graduate with his or her cohort. In the event that a student does not graduate with their cohort, SOCS will provide the student with an opportunity to continue their education, as long as they are continuously enrolled in public school and making satisfactory progress towards a diploma, per Education Code Section 47612(b).

Learning Period Meetings (“LPMs”)

Learning Period Meetings are an important component of the plan to assess student progress. They occur at least once per learning period and are a time when the credentialed teacher spends one-on-one time interacting with the students, assigning work and reviewing the student’s completed assignments/body of work. During this meeting, the credentialed teacher documents student progress toward the measurable student goals and indicates the standards in which the student made progress. This progress is documented in the student information system. During this meeting, the teacher also collects work samples which are used as authentic evidence of the student’s abilities and progress. The teacher will also ensure that an appropriate amount of progress was made by the student for the number of days of attendance being claimed. The teacher will plan the next learning period’s assignments.

Local Assessments

1st-12th Grade Local Assessment

SOCS-S uses a school adopted, state-approved verified data local diagnostic assessment for students in grades 1-12 for math and reading. In addition, ongoing progress monitoring may be administered to show whether students are on track to achieve end-of-year targets. The results from the assessment provide standards based data necessary for meeting state and Charter School requirements.

Transitional Kindergarten Local Assessment

All transitional kindergarten students take a Transitional Kindergarten (TK) pre/post assessment, which is a paper and pencil diagnostic. Students will be assessed on their letter/sounds, word recognition, number sense and math concepts.

Kindergarten Local Assessment Options

SOCS strongly encourages kindergarten students to take the 1st - 12th Grade Local Assessment. However, upon parent/guardian request, kindergarten students may take the TK assessment in lieu without operations and accountability department approval.

2) Use and Reporting of Data

Collecting, Analyzing, and Utilizing Data

The Charter School relies on the robust data collection and reporting abilities inherent in the student information system and local assessment interfaces. The web-based SIS stores comprehensive data about students, instructors, courses, applications, and enrollments in a single database, enabling educators to quickly retrieve information and create custom reports. Charter School faculty has access to reports that detail students’ progress and challenges and can take

advantage of a variety of automated interventions to help keep students on track.

The local assessment, yields easy to use reporting and ongoing progress monitoring which provide parents/guardians and teachers with real-time insights for each student. Using advanced technology, the platform dynamically adapts based on student response patterns, which allows the assessment to be more accurate and efficient in pinpointing students' needs as compared to traditional fixed-form tests.

More specifically, as the diagnostic adapts, it provides easier or harder questions depending on students' answers to previous questions. By adapting across grades the diagnostic helps teachers understand the root causes behind student challenges. This is especially beneficial for teachers and parents/guardians in providing differentiated instruction, for identifying gaps spanning back multiple years, or determining where students are ready for further challenges.

Based on the diagnostic results, the local assessment automatically provides access to individualized online and teacher-led instruction targeted to each student's unique needs. In addition, easy-to-read reports provide teachers and parents/guardians with a detailed action plan for individual instruction, as well as the tools needed to deliver that instruction.

These data, mechanisms, and intervention procedures are used by teachers to assess each student's needs and deploy appropriate modifications. Teachers adjust and enhance course content with a variety of student assignments, projects, and assessments, each created to address different learning styles, levels of challenge, or student needs. In addition, independent study teachers may adjust curriculum, materials, and services in order to ensure students are maximizing their potential.

Reporting Data to Stakeholders

Student scores on statewide assessments will be provided to parents/guardians.

Like other public schools, SOCS's annual performance will be shared with the community via the state's School Accountability Report Card ("SARC"), which is then published and available online at the California Department of Education website.

SOCS will provide requested reports to the District and the Charter School's governing board as needed.

ELEMENT 4: GOVERNANCE STRUCTURE

Governing Law: The governance structure of the charter school, including, but not limited to, the process to be followed by the charter school to ensure parental involvement. – California Education Code Section 47605(c)(5)(D)

Sage Oak Charter School is a directly funded independent charter school and is operated by Sage Oak Charter Schools, a California nonprofit public benefit corporation, pursuant to California law.

The Charter School will continue to operate autonomously from the District, with the exception of the supervisory oversight as required by statute and other contracted services as may be negotiated between the District and the Charter School. Pursuant to Education Code Section 47604(d), the District shall not be liable for the debts and obligations of the Charter School, operated by a California non-profit public benefit corporation, or for claims arising from the performance of acts, errors, or omissions by the Charter School, as long as the District has complied with all oversight responsibilities required by law.

SOCS has received its full tax-exempt status from the federal and California state governments, under the federal Internal Revenue Code Section 501(c)(3) and the companion California state tax laws and regulations. See Exhibits for copies of the Articles of Incorporation, corporate bylaws, and Conflict of Interest Code. SOCS is operated by a set of mission-driven policies and procedures to help staff and administrators perform their daily responsibilities with a focus on the Charter School's mission.

Governance Structure

SOCS is governed by the SOCS governing board ("Board") in accordance with its adopted bylaws, which shall be consistent with the terms of this charter.

The SOCS Board shall have no fewer than three (3) and no more than nine (9) directors. All directors shall be designated by the existing governing board. All directors are to be designated at the corporation's annual meeting of the governing board.

To establish continuity and sustainability for the charter school, initial governing board members shall each serve a fixed five-year term. At the end of the initial term, governing board members will be elected to one, two, and three-year terms, as determined by the then-seated governing board, consistent with the bylaws. All governing board members, thereafter, will be elected to serve three-year terms.

In accordance with Education Code Section 47604(c), the District may appoint a representative to sit on the SOCS governing board.

Governing Board Duties

SOCS's governance responsibilities will primarily be divided between the governing board and the Superintendent. The Superintendent and faculty will carry out the day-to-day operations of the Charter School, with the Superintendent having primary responsibility to conduct and manage the daily operations. The governing board will set policy, approve the budget, and assure that the Charter School maintains high academic standards. The SOCS governing board shall have ultimate responsibility to oversee the operation and activities of the Charter School.

The governing board's major roles and responsibilities will include:

1. Establishing and approving all major educational and operational policies.
2. Approving all major contracts.

3. Approving the Charter School's annual budget and overseeing the Charter School's fiscal affairs.
4. Hearing expulsion recommendations at scheduled governing board meetings to meet the 30 day timeframe for expulsion requirements.
5. Evaluating the Superintendent who oversees the day-to-day operations of the Charter School and implementing the policy direction of the Board.
6. Developing annual goals for the Charter School and long range plans with input from the Superintendent, teachers, and parent/guardian advisory council members.
7. Receiving reports from, and providing recommendations to the Superintendent relative to long-term strategic planning.
8. Assessing SOCS's goals, objectives, academic achievements/student progress, financial status, and any need for redirection.
9. Evaluating Charter School and student performance.

The governing board is responsible for the accountability requirements established by the California Charter Schools Act of 1992 and the charter itself. One of the governing board's primary responsibilities is to ensure that SOCS is meeting annual accountability targets. The governing board will routinely evaluate the academic, financial, and legal/compliance health of the Charter School and update the District on our progress toward goals, actions, and outcomes outlined in our LCAP.

The governing board's objective is to develop an LCAP and an annual update to the LCAP that demonstrates measurable annual progress toward meeting the Charter School's high standards for student success, and to oversee the implementation of that plan by the Charter School's Superintendent.

Board Training and Sustainability

Board members are committed to continuous improvement and ongoing training to assist the governing board in fulfilling its responsibilities to act as stewards for the Charter School. To this end, the Board will seek appropriate training and educational opportunities to more effectively govern SOCS's operations. Such training experiences may include individual training sessions with legal counsel or other experts familiar with public school governance, and/or training sessions with charter school governance experts. The Charter School will maintain in effect general liability and board errors and omissions insurance policies.

The Board of Directors of the Charter School will meet regularly and in accordance with the Brown Act and Education Code Section 47604.1(c).

The Charter School has adopted a Conflict of Interest Code that complies with the Political Reform Act, Government Code Section 1090, *et seq.*, as set forth in Education Code Section 47604, and Corporations Code conflict of interest rules, and which shall be updated with any charter school-specific conflict of interest laws or regulations. As noted above, the Conflict of Interest Code is attached within Exhibit C.

Parental Involvement

SOCS believes that active parent/guardian, student, and employee participation in Charter School operations and governance helps foster a public school's long-term sustainability as a successful program. SOCS will encourage parent/guardian involvement and will ensure that all faculty practice open communication to enable every parent/guardian to take an active role in the academic progress of their enrolled student as well as in the direction and governance of the Charter School.

SOCS shall maintain an advisory council that may be comprised of parents/guardians, students, certificated staff, and classified staff. The advisory council plays an important role in making SOCS a school that is responsive to staff's, students', and parents/guardians' needs, and will provide for continual improvement. The advisory council meets regularly and function to address and make recommendations to the school's leadership team and/or Superintendent regarding specific areas of Charter School operations.

The SOCS academic model requires frequent outreach to parents/guardians and easy accessibility to faculty. Parents/guardians will receive various email notifications regarding their student's pace and progress, and all parents/guardians will have at least monthly contact with their student's academic team.

Parents/guardians may be surveyed at least once a year to determine their satisfaction levels with the Charter School with respect to open governance, curriculum, instructional design and delivery methods, achievement of performance objectives, and other metrics that factor into the Charter school's governance and accountability.

These multiple reporting mechanisms, combined with the availability of faculty to parents/guardians during and beyond normal business hours, are designed to keep parents/guardians apprised, informed, and involved. This puts parents/guardians in a position to influence school decisions affecting their students.

The forum for major Charter School decisions will be public meetings of the governing board. SOCS will post Board agendas on its website in compliance with the Brown Act, so parents/guardians will have the opportunity to share concerns and provide written and oral testimony regarding decisions pending before the Board.

ELEMENT 5: EMPLOYEE QUALIFICATIONS

*Governing Law: The qualifications to be met by individuals to be employed by the charter school.
– California Education Code Section 47605(c)(5)(E)*

SOCS is dedicated to hiring exemplary staff who are committed to its mission, vision and values. All administrators, faculty, and staff members to be employed by SOCS must possess the qualifications, knowledge base, and experience essential to successfully fulfill their responsibilities as determined by the SOCS's governing board and Superintendent. SOCS will ensure that all

applicable legal requirements are met for teachers, staff, paraprofessionals and other administrative employees of the Charter School. Each certificated employee at the Charter School will meet the applicable state licensing and/or credentialing requirements. For all positions, certificated and non-certificated, the employee, at minimum needs to satisfactorily meet the performance specifications SOCS requires for the position, as outlined below, and must possess the qualifications required to perform the essential functions of the position, as determined by the SOCS's governing board and Superintendent.

SOCS is an equal opportunity employer and does not discriminate against individuals based on actual or perceived race (including traits historically associated with race, including, but not limited to, hair texture, and protective hairstyles such as braids, locks, and twists), color, creed, actual or perceived gender (including gender identity and gender expression), religion (all aspects of religious beliefs, observance or practice, including religious dress or grooming practices), marital status, registered domestic partner status, status as a victim of domestic violence, assault or stalking, age (40 and over), ethnicity, national origin or ancestry (including language use restrictions), citizenship, physical, intellectual or mental disability (including HIV and AIDS), medical condition (including cancer or a record or history of cancer, and genetic characteristics), reproductive health decision-making, family or medical leave status, sex (including pregnancy, childbirth, breastfeeding or a related medical condition), genetic information, sexual orientation, political affiliation, military and veteran status or any other consideration made unlawful by federal, state, or local laws. The Charter School prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics. Sage Oak complies with the Americans with Disabilities Act to ensure equal access to all qualified individuals with a disability. Background checks are conducted on all prospective new hires.

Hiring Plan

SOCS seeks to hire a diverse faculty composed of highly effective teachers and highly skilled professionals who express an understanding of and support for our mission and student population. We will achieve this goal by recruiting and compensating our faculty and staff based on their ability to meet the needs of our program as outlined in our hiring and evaluation rubric. The rubric will contain qualifications and criteria directly aligned to the qualities we believe are essential for effective teaching and learning within the SOCS program, as outlined in Element I of this charter petition.

The Superintendent will prepare and recommend to the Charter School governing board for approval, salary and benefit levels, working conditions, and work year characteristics (e.g. length of year and day and vacation policies) for all employees that will allow Charter School to attract and retain the caliber of employees necessary for the Charter School's success.

Faculty and Paraprofessional Qualifications

SOCS has a highly specified set of qualities it requires of its teaching faculty. Pursuant to the Every Student Succeeds Act, charter schools are free to design personnel systems and hire staff that meet the unique needs of the charter school. All teachers and paraprofessionals at SOCS will meet

applicable state certification and licensure requirements. In accordance with Education Code Section 47605(l), SOCS shall ensure that teachers at SOCS hold the Commission on Teacher Credentialing certificate, permit, or other document required for the teacher's certificated assignment. These documents shall be maintained on file at the charter school and will be made available for periodic inspection by the District.

The Charter School may use the local assignment options authorized in statute and regulations for the purpose of legally assigning certificated teachers, in the same manner as a governing board of a school district. Teachers employed by charter schools during the 2019–20 school year shall have until July 1, 2025, to obtain the certificate required for the teacher's certificated assignment, pursuant to Education Code Section 47305.4(a). All teachers shall obtain a certificate of clearance and satisfy the requirements for professional fitness pursuant to Education Code sections 44339, 44340, and 44341.

The Charter School shall ensure that all paraprofessionals employed by the Charter School shall meet all applicable requirements under Education Code Section 45330.

The teacher is responsible for implementing appropriate strategies that assist each student in achieving their academic potential while also providing superior customer service to all internal and external customers.

Typical activities for the teacher may include:

- Evaluate student work as prescribed by SOCS's grading policy, and provide feedback on graded assignments, in which students are encouraged to be actively engaged in the learning process.
- Contribute to a climate where students are actively engaged in meaningful learning experiences.
- Work with the leadership team and other SOCS instructors to produce learning experiences suited to the grade level and to the student developmental level that will enhance student achievement.
- Communicate in a professional manner.
- Award and update student attendance in the student information system.
- Model professional and ethical standards when dealing with students, parents/guardians, and community.
- Meet established deadlines.
- Conform with and abide by SOCS work procedures and instructions, and SOCS regulations and policies.
- Attend IEP meetings and complete the necessary documentation.
- When requested, participate in student and parent/guardian conferences, marketing events, and proctor exams.
- Participate in committees and organizations as needed.
- Maintain effective and efficient records.
- Implement curriculum using activities that contribute to a climate where students are actively engaged in meaningful learning experiences and be available to assist students in person or via phone, email, and instant message.

- Identify, select, and modify instructional resources to meet the needs of students with varying backgrounds, learning styles, and special needs.
- Approach situations with a student-centered attitude and flexibility that promotes student success.
- Partake in professional development opportunities.

Administrative and Non-Instructional Staff

The Charter School will seek administrative and operational staff members who have demonstrated experience or expertise in the issues and work tasks required of them. They will be provided professional development opportunities to ensure that they remain abreast of all relevant changes in laws appropriate for their position within the Charter School as outlined in the Charter School's staffing plan and the Charter School's adopted personnel policies. *See Exhibit B for administrative job descriptions for key positions and their requisite qualifications.*

General Requirements, Hiring and Performance Review

Prior to employment, each employee will submit to a criminal background check as required by Education Code Section 44237. Prior to beginning work, all employees will be required to undergo a criminal background check prior to hiring through a LiveScan fingerprint process secured by the California Department of Justice and, if classified, the Federal Bureau of Investigation. These services will occur where the LiveScan service is offered. The Charter School will adhere to California laws including fingerprinting, drug testing, and prohibitions regarding the employment of persons who have been convicted of a violent or serious felony.

All employees must undergo a tuberculosis ("TB") risk assessment and/or examination (if necessary) and determined to be free of active tuberculosis within the period of 60 days prior to employment/service, or otherwise meet the requirements of Education Code Section 49406. Employees must also furnish proof of documents establishing legal employment status. The Superintendent and/or administrative designee will be responsible for monitoring and maintaining documentation of medical and criminal investigation clearances, as required by California and federal laws.

The Superintendent will have the authority to recruit and interview candidates and make hiring recommendations to the governing board for approval.

The Superintendent and/or designee will have the responsibility of evaluating the performance of the teaching and administrative staff, and to review the results of the performance reviews with the governing board. The SOCS governing board has the right, if it so chooses, to review these performance reviews before they are delivered to the staff members.

The Superintendent and/or designee, with input from the SOCS governing board as applicable, will determine the criteria by which to judge the performance of employees prior to conducting a formal performance review. These criteria will be tied directly to SOCS's educational program goals and will utilize a performance review rubric. The rubric will, among other criteria, be used to tie job reviews to relevant performance areas such as delineated in individual job descriptions,

school and individual goals.

The SOCS governing board will create the job and performance review of the Superintendent. The Superintendent's performance will be objectively evaluated based on school and student success as reflected in a predefined set of performance criteria.

Professional Development for Instructional Staff

SOCS is committed to the ongoing improvement of its staff. Relevant professional development conferences (ex. CCSA, CSDC, ACSA) will be attended where to keep up to date and be informed on current educational trends. For leadership, professional development meetings are held regularly. We also hold in person meetings to cover topics such as human resources, special education, legal trends and more.

All Charter School employees who are mandated reporters, as defined in Section 11165.7 of the Penal Code will be trained in their role as a mandated reporter. Additionally, staff will complete other school safety trainings on topics such as bloodborne pathogen safety and sexual harassment along with trainings as outlined in school policies.

Our professional development program for new teachers is structured in three parts: onboarding, first year induction (mentoring), and continuing education:

Onboarding

- Mission, vision and core values
- Understanding the independent study educational experience
- Working within online systems (e.g. ordering system and virtual classroom) and student information system
- Communicating with students and parents/guardians
- Understanding and using independent study metrics
- Motivating students and meeting the unique needs of students
- Monitoring and guiding student pacing
- Managing the protocols of independent study learning: pace charts, contact histories, grading, various educational philosophies
- Technology tools for effective teaching

Mentoring

During their first year, teachers are partnered with experienced educators to support them. Teachers new to the profession will be required to complete an induction program.

Continuing Education

- Teachers are provided with opportunities to expand their knowledge of personalized learning strategies throughout the year by participating in various professional

development programs.

- Teachers are surveyed to determine areas of need, and SOCS will provide programs to meet the expressed needs.

Individual Professional Development Plans

Additionally, all full-time school staff members are required to develop annual goals that identify areas of development that will lead to professional growth. This plan will be developed in conjunction with the Superintendent or designee overseeing the employee's job review. Some areas of growth might include:

- Serving on a recognized committee
- Serving as a mentor for new school staff
- Presenting at a Charter School professional development opportunity
- Measurable implementation of selected best practices methodology that will be employed to improve support for student success.

SOCS will also allot monies every year to support individual professional development activities.

Authority and Responsibility

The Superintendent and/or designee is responsible for monitoring teacher credentials and qualifications relative to their positions. While the Charter School administration is responsible for working with each teacher in the development and management of an individualized professional development plan, the Superintendent and/or designee ensures that state mandates are appropriately enforced in all schools. This work is further supported by the oversight of the SOCS governing board.

ELEMENT 6: HEALTH & SAFETY PROCEDURES

Governing Law: The procedures that the charter school will follow to ensure the health and safety of students and staff. These procedures shall require all of the following:

- (i) That each employee of the charter school furnish the charter school with a criminal record summary as described in Section 44237.*
- (ii) The development of a school safety plan, which shall include the safety topics listed in subparagraphs (A) to (J), inclusive, of paragraph (2) of subdivision (a) of Section 32282.*
- (iii) That the school safety plan be reviewed and updated by March 1 of every year by the charter school. – California Education Code Section 47605(c)(5)(F)*

SOCS has adopted a comprehensive set of health, safety, and risk management policies. In general, health and safety matters will be dealt with in accordance with these SOCS policies. These policies have been developed in consultation with the Charter School's insurance carriers and at a minimum address the topics discussed below. These policies and procedures are incorporated as appropriate into the Charter School's student and staff handbooks and are reviewed on an ongoing basis.

The following is a summary of the health and safety procedures of the Charter School:

Procedures for Background Checks

Employees and contractors of SOCS will be required to submit to a criminal background check and to furnish a criminal record summary as required by Education Code Sections 44237 and 45125.1. Applicants for employment must submit fingerprints to the California Department of Justice for the purpose of obtaining a criminal record summary. Additionally, classified staff will be required to submit fingerprints to the Federal Bureau of Investigation (FBI). The Charter School shall not hire any person, in either a certificated or classified position, who has been convicted of a violent or serious felony except as otherwise provided by law, pursuant to Education Code Sections 44830.1 and 45122.1. The Superintendent or designee will be responsible for monitoring compliance with this policy and reporting to the Charter School governing board on a regular basis. The Board President shall monitor the fingerprinting and background clearance of the Superintendent. Volunteers who will volunteer outside of the direct supervision of a credentialed employee shall be fingerprinted and receive background clearance prior to volunteering without the direct supervision of a credentialed employee.

Tuberculosis Risk Assessment and Examination

All employees will be required to undergo a tuberculosis risk assessment and examination (if necessary) prior to commencing employment/service, and at least once every four years thereafter, as required by Education Code Section 49406. Charter School shall maintain TB clearance records and certificates on file.

Immunizations

All enrolling students who receive classroom-based instruction will be required to provide records documenting immunizations as is required at public schools pursuant to Health and Safety Code Sections 120325-120375, and Title 17, California Code of Regulations Sections 6000-6075. All rising 7th-grade students who receive classroom-based instruction must be immunized with pertussis (whooping cough) vaccine booster.

The Charter School shall exclude students from participation in classroom-based activities if the student is not immunized in accordance with applicable law. Those parents/guardians who have difficulty obtaining immunizations for their children will be provided information on where to get immunized in their community.

Medication in School

The Charter School will adhere to Education Code Section 49423 regarding administration of medication in school. The Charter School will adhere to Education Code Section 49414 regarding epinephrine auto-injectors and training for staff members.

Diabetes

The Charter School will provide an information sheet regarding type 2 diabetes to the parent/guardian of incoming 7th-grade students, pursuant to Education Code Section 49452.7. The information sheet shall include, but not be limited to, all of the following:

1. A description of type 2 diabetes.
2. A description of the risk factors and warning signs associated with type 2 diabetes.
3. A recommendation that students displaying or possibly suffering from risk factors or warning signs associated with type 2 diabetes should be screened for type 2 diabetes.
4. A description of treatments and prevention methods of type 2 diabetes.
5. A description of the different types of diabetes screening tests available.

Suicide Prevention Policy

The Charter School shall maintain a policy on student suicide prevention in accordance with Education Code Section 215. The Charter School shall review, at minimum every fifth year, its policy on pupil suicide prevention and, if necessary, update its policy.

Prevention of Human Trafficking

By January 1, 2020, the Charter School shall identify and implement the most appropriate methods of informing parents and guardians of students in grades 6 through 12 of human trafficking prevention resources.

Feminine Hygiene Products

The Charter School will stock at least 50% of its restrooms with feminine hygiene products, and shall not charge students for these products, pursuant to Education Code Section 35292.6.

California Healthy Youth Act

The Charter School shall teach sexual health education and human immunodeficiency virus (“HIV”) prevention education to students in grades 7-12, at least once in middle school and at least once in high school, pursuant to the California Healthy Youth Act (Education Code Section 51930, *et seq.*).

School Safety Plan

The Charter School shall adopt a School Safety Plan, to be reviewed and updated by March 1 of every year, which shall include, identifying appropriate strategies and programs that will provide or maintain a high level of school safety and address the Charter School’s procedures for complying with applicable laws related to school safety, including the development of all of the following pursuant to Education Code Section 32282(a)(2)(A)-(J):

- child abuse reporting procedures
- routine and emergency disaster procedures

- policies for students who committed an act under Section 48915 and other Charter School-designated serious acts leading to suspension, expulsion, or mandatory expulsion recommendations
- procedures to notify teachers of dangerous students pursuant to Education Code Section 49079
- a discrimination and harassment policy consistent with Education Code Section 200
- provisions of any school-wide dress code that prohibits students from wearing "gang-related apparel," if applicable
- procedures for safe ingress and egress of students, parents/guardians, and employees to and from the Charter School
- a safe and orderly environment conducive to learning
- the rules and procedures on Charter School discipline adopted pursuant to Education Code Sections 35291, 35291.5, 47605, and 47605.6
- procedures for conducting tactical responses to criminal incidents

Emergency Preparedness

The Charter School shall adhere to emergency preparedness procedures included in our safety plan drafted specifically to the needs of the facility in conjunction with law enforcement and the Fire Marshal. This handbook shall include, but not be limited to the following responses: fire, flood, earthquake, terrorist threats, and hostage situations.

Staff shall receive training in emergency response, including appropriate "first responder" training or its equivalent.

Facility Safety

SOCS will comply with Education Code Section 47610 by utilizing administrative facilities (and any other resource center, meeting space, or other satellite facility that SOCS may establish) that are either compliant with the Field Act or facilities that are compliant with the California Building Standards Code. The Charter School will comply with all other applicable federal, state, and local building codes and requirements applicable to California charter schools, including the Americans with Disabilities Act, and other applicable fire, health, and structural safety requirements, and will maintain on file records documenting such compliance. SOCS will ensure that its administrative offices will be housed in facilities that have received state Fire Marshal approval and that have been evaluated by a qualified structural engineer who has determined the facilities present no substantial seismic safety hazard. The Charter School will obtain all necessary permits for these offices including a building and fire marshal inspection and/or a certificate of occupancy. The Charter 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.

Drug-, Alcohol-, and Smoke-Free Environment

SOCS shall function as a drug, alcohol, and smoke-free environment.

Blood-borne Pathogens

SOCS shall meet state and federal standards for dealing with blood-borne pathogens and other potentially infectious materials in the workplace. An “Exposure Control Plan” shall be designed to protect employees from possible infection due to contact with blood-borne viruses, including HIV and hepatitis B virus (“HBV”). Whenever exposed to blood or other body fluids through injury or accident, students, and staff should follow the latest medical protocol for disinfecting procedures.

Child Abuse Prevention and Reporting

SOCS will maintain detailed policies and procedures for the immediate reporting of suspected child abuse, neglect, acts of violence, or other improprieties. Such policies will detail the role and obligation of staff in the reporting of child abuse pursuant to Penal Code Section 11164 *et seq.* All staff will be mandated child abuse reporters and will follow all applicable reporting laws. The Charter School shall provide all employees, and other persons working on behalf of the Charter School who are mandated reporters, with annual training on child abuse detection and reporting, in accordance with Education Code Section 44691.

Comprehensive Anti-Discrimination and Harassment Policies and Procedures

The Charter School is committed to providing a school that is free from discrimination and sexual harassment, as well as any harassment based on actual or perceived race (including traits historically associated with race, including but not limited to, hair texture and protective hairstyles such as braids, locks and twists), color, creed, actual or perceived gender (including gender identity and gender expression), religion (all aspects of religious beliefs, observance or practice, including religious dress or grooming practices), marital status, registered domestic partner status, status as a victim of domestic violence assault or stalking, age (40 and over), ethnicity, national origin or ancestry (including language use restrictions), citizenship, physical, intellectual or mental disability (including HIV and AIDS), medical condition (including cancer or aq record or history of cancer, and genetic characteristics), reproductive health decision-making, family or medical leave status, sex (including pregnancy, childbirth, breastfeeding or a related medical condition), genetic information, sexual orientation, political affiliation, military and veteran status or any other consideration made unlawful by federal, state, or local laws. The Charter School also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics. The Charter School shall develop a comprehensive policy to prevent and immediately remediate any concerns about 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 Charter School’s anti-discrimination and harassment policies. A copy of the policy shall be provided as part of any orientation program conducted for new and continuing pupils at the beginning of each quarter, semester, or summer session, as applicable, and to each faculty member, all members of the administrative staff, and all members of the support staff at the beginning of the first quarter or semester of the school year, or at the time that there is a new employee hired. While the Charter School does not currently have a school site with students present, if the Charter School were to obtain such a site, the Charter School shall create a poster that notifies students of the applicable policy on sexual harassment in

accordance with Education Code Section 231.6.

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

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

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

Title IX Administrator
1473 Ford Street, Suite 105
Redlands, CA 92373
hrsupport@sageoak.education

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

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

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

ELEMENT 7: STUDENT POPULATION BALANCE

Governing Law: The means by which the charter school will achieve a balance of racial and ethnic pupils, special education pupils, and English learner pupils, including redesignated fluent English proficient pupils, as defined by the evaluation rubrics in Section 52064.5, that is reflective of the general population residing within the territorial jurisdiction of the school district to which the charter petition is submitted. Upon renewal, for a charter school not deemed to be a local educational agency for purposes of special education pursuant to Section 47641, the chartering authority may consider the effect of school placements made by the chartering authority in

providing a free and appropriate public education as required by the federal Individuals with Disabilities Education Act (Public Law 101-476), on the balance of pupils with disabilities at the charter school. – California Education Code Section 47605 (b)(5)(G)

SOCS actively recruit a diverse student population from within its legally prescribed service area. Within that boundary, admission will be open to any California resident, and all students will be considered for admission without regard to any characteristic listed in Education Code Section 220 (or association with an individual who has any of those characteristics).

SOCS implements a student recruitment strategy that will be represented by, but is not necessarily limited to, a combination of elements or strategies to ensure a diverse student body and to achieve a balance of racial and ethnic students, special education students, and English Learners, including redesignated fluent English proficient students, that is reflective of the general population residing within the territorial jurisdiction of the District.

SOCS will engage in various outreach activities, that may include, but is not limited to, the following:

1. **Marketing Materials:** Design flyers and distribute informational materials to appeal to various groups in order to achieve the required balance. Materials will be developed in English, Spanish, and other common languages in the District area.

SOCS provides printed postcards and e-flyers to all teachers to distribute or post online in the counties where they reside, which include the counties of Los Angeles, Orange, Ventura, and San Bernardino. Printed postcards and other promotional materials include information about its programs and student offerings with a link and QR code to the SOCS-S website and contact information for our parent support team. Starting in the 2022-23 school year, the parent support team hired a parent support specialist fluent in Spanish to assist in communicating via phone and email with Spanish-speaking prospective families.

2. **Community Events:** SOCS will host community events in all regions it serves students. SOCS staff will also attend community events such as homeschool conferences and will provide flyers to interested parents/guardians in English and Spanish. Marketing materials at such events will ensure a balance that is reflective of the general population residing within the District.

SOCS hosted two in-person coffee question-and-answer events, attended an educational fair, and provided informational postcards to prospective families in the 2022-23 school year.

SOCS-S hosted 16 virtual enrollment webinars between January 2023-June 2023 about the SOCS-S K-8 Personalized Learning Academy, K-8 Virtual Learning Academy, and 9-12 high school programs and offerings. By providing informational webinars online, this provided an opportunity for prospective families in all areas to attend at a time and day that worked best for their schedule. SOCS-S utilized social media and posted actively in Facebook Community Groups in the counties of Los Angeles, Orange, Ventura, and San Bernardino to help promote these virtual enrollment webinars among families interested in nonclassroom-based charter schools and educational programs similar to SOCS-S.

3. Advertising: SOCS will ensure its website and social media reflect a balance that is reflective of the general population residing within the Districts.

SOCS utilized paid social media advertising on Facebook and Instagram platforms that promoted enrollment via website visits to the SOCS-S website enroll page. Ads were targeted to Los Angeles County, Orange County, Ventura County, and San Bernardino County. The targeted audience included parents and families of TK-12 students with multicultural affinity behaviors and interests of Hispanic American culture, Hispanic culture, and Latino culture.

SOCS utilized pay-per-click (PPC) ads to promote enrollment through Google Search and other search engines driving audiences to visit the SOCS-S website enrollment page. Targeted areas include Los Angeles County, Orange County, Ventura County, and San Bernardino County.

SOCS utilizes photo and video content of students and stock photos to showcase a diverse student population including those of Hispanic descent.

SOCS engages regularly in Facebook Community Groups through organic posts and by responding to questions from families about how to enroll at SOCS-S, curriculum, program offerings, and how to attend virtual webinars to receive more information about the school. SOCS-S actively participates in these Facebook Community Groups, in the regions of Los Angeles County, Orange County, Ventura County, and San Bernardino County.

SOCS regularly shares photos and video content online including Facebook, Instagram, Twitter, and the SOCS-S website showing SOCS-S students, classes, field trips, events, and other engagement opportunities. SOCS-S makes a concerted effort to capture and utilize photos that represent the diversity of our student population.

4. Establish Partnerships with Community Organizations: SOCS will explore potential partnerships within the local and regional communities inclusive of our community colleges and business sector.

SOCS maintains partnerships with West LA College and Santa Monica College. These partnerships allowed SOCS students access to the course catalog at both colleges. Through West LA College, SOCS is able to reserve seats for students in ASL I and ASL II courses. Through Santa Monica College, SOCS is able to reserve seats for students in economics, United States History, Interpersonal Communication, English I, and Political Science I courses. SOCS has an official CCAP partnership with Crafton Hills College. We plan to expand course offerings to students through Crafton Hills College.

As a result of these efforts, SOCS has consistent growth in the diversity of its student body as demonstrated in the historical enrollment trend data included at the beginning of this renewal charter petition. In particular, Hispanic/Latino student enrollment as a share of the SOCS student body has increased by over 40% since SOCS's founding and represents the largest student group.

SOCS will continue these student population balance efforts in order to more closely align with the demographics of the territory SOCS-S serves.

ELEMENT 8: ADMISSION POLICIES AND PROCEDURES

Governing Law: Admission policies and procedures, consistent with [Education Code Section 47605] subdivision (e). California Education Code Section 47605(c)(5)(H).

The Charter School will be nonsectarian in its programs, admission policies, and all other operations, and will not charge tuition or discriminate against any student based upon any of the characteristics listed in Education Code Section 220.

SOCS shall admit all students who wish to attend the Charter School. No test or assessment shall be administered to students prior to acceptance and enrollment into the Charter School. The Charter School will comply with all laws establishing minimum and maximum age for public school attendance in charter schools. Admission, except in the case of a public random drawing, shall not be determined by the place of residence of the student or his or her parent/guardian within the state unless required by Education Code Section 51747.3. In accordance with Education Code Sections 49011 and 47605(e)(2)(B)(iv), admission preferences shall not require mandatory parental volunteer hours as a criterion for admission or continued enrollment.

In accordance with Education Code Section 47605(e)(4)(A), the Charter School shall not discourage a pupil from enrolling or seeking to enroll in the Charter School for any reason, including, but not limited to, academic performance of the pupil or because the pupil exhibits any of the characteristics described in Education Code Section 47605(e)(2)(B)(iii), including pupils with disabilities, academically low-achieving pupils, English learners, neglected or delinquent pupils, homeless pupils, or pupils who are economically disadvantaged, as determined by eligibility for any free or reduced-price meal program, foster youth, or pupils based on nationality, race, ethnicity, or sexual orientation. Similarly, in accordance with Section 47605(e)(4)(C), the Charter School shall not encourage a pupil currently attending the Charter School to disenroll from the Charter School or transfer to another school for any reason, including, but not limited to the academic performance of the pupil or because the pupil exhibits any of the characteristics described in Education Code Section 47605(e)(2)(B)(iii), as listed above.

Pursuant to Education Code Section 47605(e)(4)(D), the Charter School shall post a notice developed by the CDE on the Charter School website, outlining the requirements of Section 47605(e)(4), and make this notice available to parents.

The Charter School shall require students who wish to attend the Charter School to complete an application form. After admission, all students and their parents/guardians must complete and submit an enrollment packet, which includes a release of records¹ and agreeing to and signing the Master Agreement. All students' continued enrollment shall depend upon them fulfilling the terms of the Master Agreement. Enrollment space will be based on need in the community and availability of qualified, trained credentialed teachers to serve as the teacher of record.

¹ The Charter School shall not request a pupil's records or require a parent, guardian, or pupil to submit the pupil's records to the Charter School before enrollment.

Recruiting and Admissions Cycle

The Charter School will establish an annual recruiting and admissions cycle, which shall include reasonable time for all of the following: (1) outreach and marketing, (2) orientation sessions for students and parents/guardians, (3) an admissions application period, (4) an admissions lottery, if necessary, and (5) enrollment. The Charter School may fill vacancies or openings that become available after this process using a waiting list created in accordance with the admissions lottery procedures specified in this charter.

Timeline for Recruiting and Enrollment

The Charter School will recruit and enroll students from areas from which they are legally allowed to recruit and enroll. Applications will be accepted during a publicly advertised open enrollment period each year for enrollment in the following school year. Following the open enrollment period each year, applications shall be counted to determine whether any region has received more applications than availability. In the event that this happens, the Charter School will hold a public random drawing (or "lottery") to determine admission for the impacted region, with the exception of existing students, who are guaranteed admission in the following school year. In any year in which a random public drawing is not required because the number of applications does not exceed the Charter School's capacity, SOCS will admit all students who meet the admission and application requirements stated in the Charter. Applications for admission will be accessible the Charter School's website.

Lottery – Public Random Drawing

In the event that the number of students seeking admission to any region exceeds capacity, a lottery will be held for the impacted regions, with the exception of existing students, who are guaranteed admission in the following school year. It will be completed in a physical or virtual public forum large enough to accommodate all those who wish to attend.

Once a student has been enrolled as a student at SOCS, they have the right to continue here until they have completed the highest grade we offer. Students who are currently enrolled at SOCS must re-commit for the following school year by the end of open enrollment by signing a Master Agreement for the following year.

Admission preferences in the case of a public random drawing shall be given to the following students in the following order:

1. Siblings of students admitted to or attending the Charter School;
2. Children of Charter School staff;
3. Students who have been previously enrolled in SOCS;
4. Residents of the District;
5. All other applicants.

The Charter School and the District agree to adhere to the requirements related to admission preferences as set forth in Education Code Section 47605(e)(2)(B)(i)-(iv).

The governing board will take all necessary efforts to ensure lottery procedures are fairly executed. Lottery spaces are pulled by region by the designated lottery official (appointed by the Superintendent). Separate lotteries shall be conducted for each region in which there are fewer vacancies than students interested in attending. All lotteries shall take place on the same day in a single location. There is no weighted priority assigned to the preference categories; rather, within each region, students will be drawn from pools beginning with all applicants who qualify for the first preference category and shall continue with that preference category until all vacancies within that grade level have been filled. If there are more students in a preference category than there are spaces available, a random drawing will be held from within that preference category until all available spaces are filled. If all students from the preference category have been selected and there are remaining spaces available in that grade level, students from the second preference category will be drawn in the lottery, and the drawing shall continue until all spaces are filled and preference categories are exhausted in the order provided above.

At the conclusion of the lottery, all students who were not granted admission due to capacity will be placed on a prospective student list in the order drawn. This list will allow students the option of enrollment in the case of an opening during the current school year. In no circumstance will a prospective student carry over to the following school year.

Admission will not be based on prior student performance or admission testing. Post matriculation, various assessments may be administered to determine the student's readiness for the grade of entrance requirements or maintenance of said grade. These instruments aid in the development of individualized learning plans for students.

If SOCS receives applications after the open enrollment period and lottery and before the applicable school year has started, the Charter School will place students in the Charter School in the order the applications are received, if the Charter School has capacity to serve the students based on the students' county of residence.

Public random drawing rules, deadlines, dates and times will be communicated in the application form and on the Charter School's website. Public notice for the date and time of the public random drawing will also be posted once the application deadline has passed. The Charter School will also inform all applicants and interested parties of the rules to be followed during the public random drawing process via mail or email at least two weeks prior to the lottery date.

The Charter School will conduct the lottery in the spring for enrollment in the fall of that year.

ELEMENT 9: INDEPENDENT FINANCIAL AUDITS

Governing Law: The manner in which annual, independent financial audits shall be conducted, which shall employ generally accepted accounting principles, and the manner in which audit exceptions and deficiencies shall be resolved to the satisfaction of the chartering authority. – California Education Code Section 47605(c)(5)(I)

An annual independent financial audit of the books and records of the Charter School will be conducted as required by Education Code Sections 47605(c)(5)(I) and 47605(m). The books and records of the Charter School will be kept in accordance with generally accepted accounting principles, and as required by applicable law, the audit will employ generally accepted accounting procedures. The audit shall be conducted in accordance with applicable provisions within the California Code of Regulations governing audits of charter schools as published in the State Controller's K-12 Audit Guide.

The SOCS governing board will form an audit committee each fiscal year to oversee selection of an independent auditor and the completion of an annual audit of the Charter School's financial affairs. The auditor will have, at a minimum, a CPA and educational institution audit experience and will be approved by the State Controller on its published list as an educational audit provider. The audit will verify the accuracy of the Charter School's financial statements, attendance and enrollment, and accounting practices, and will review the Charter School's internal controls.

To the extent required under applicable federal law, the audit scope will be expanded to include items and processes specified in any applicable Office of Management and Budget Circulars.

The annual audit will be completed and forwarded to the District, the County Superintendent of Schools, the California Department of Education, and the State Controller by December 15 each year. The Charter School's audit committee will review any audit exceptions or deficiencies and report to the Charter School's governing board with recommendations on how to resolve them. The governing board will report to the District regarding how the exceptions and deficiencies have been or will be resolved. Any disputes regarding the resolution of audit exceptions and deficiencies will be referred to the dispute resolution process contained in this charter. Audit appeals or requests for summary review shall be submitted to the Education Audit Appeals Panel ("EAAP") in accordance with applicable law.

The independent financial audit of the Charter School is a public record to be provided to the public upon request.

ELEMENT 10: SUSPENSION/EXPULSION/INVOLUNTARY DISENROLLMENT PROCEDURES

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

- (i) For suspensions of fewer than 10 days, provide oral or written notice of the charges against the student and, if the student denies the charges, an explanation of the evidence that supports the charges and an opportunity for the student to present the pupil's side of the story.*
- (ii) For suspensions of 10 days or more and all other expulsions for disciplinary reasons, both of the following:*

- (I) *Provide timely, written notice of the charges against the student and an explanation of the student's basic rights.*
- (II) *Provide a hearing adjudicated by a neutral officer within a reasonable number of days at which the student has a fair opportunity to present testimony, evidence, and witnesses and confront and cross-examine adverse witnesses, and at which the student has the right to bring legal counsel or an advocate.*
- (iii) *Contain a clear statement that no student shall be involuntarily removed by the charter school for any reason unless the parent or guardian of the student has been provided written notice of intent to remove the student no less than five school days before the effective date of the action. The written notice shall be in the native language of the student or the student's parent or guardian or, if the student is a foster child or youth or a homeless child or youth, the student's educational rights holder, and shall inform the pupil, the pupil's parent or guardian, or the pupil's educational rights holder of the right to initiate the procedures specified in clause (ii) before the effective date of the action. If the student's parent, guardian, or educational rights holder initiates the procedures specified in clause (ii), the student shall remain enrolled and shall not be removed until the charter school issues a final decision. For purposes of this clause, "involuntarily removed" includes disenrolled, dismissed, transferred, or terminated, but does not include suspensions specified in clauses (i) and (ii). – California Education Code Section 47605(c)(5)(j)*

Policy This Suspension and Expulsion Policy has been established in order to promote learning, provide for the safety of students, staff, and visitors to SOCS, and serve the best interests of students and their parents/guardians. In creating this policy, the Charter School reviewed Education Code Section 48900 *et seq.* which describes the non-charter schools' list of offenses and procedures to establish its list of offenses and procedures for suspensions and expulsions. The language that follows gives protections to Charter School students similar to those provided by Education Code Section 48900 *et seq.* The Charter School is committed to an annual review of policies and procedures surrounding suspensions and expulsions and, as necessary, modification of the lists of offenses for which students are subject to suspension or expulsion.

When the Policy is violated, it may be necessary to suspend or expel a student from regular instruction. This policy shall serve as SOCS's policy and procedures for student suspension and expulsion and it may be amended from time to time without the need to amend the charter so long as the amendments comport with legal requirements. SOCS staff shall enforce disciplinary rules and procedures fairly and consistently among all students. This Policy and its Procedures will be printed and distributed as part of the Student Handbook and will clearly describe discipline expectations. SOCS will develop a procedure for the periodic review and amendment of this Policy and, in particular, the lists of offenses for suspension or expulsion.

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

Corporal punishment shall not be used as a disciplinary measure against any student. For purposes of the Policy, corporal punishment does not include an employee's use of force that is reasonable

and necessary to protect the employee, students, staff, or other persons or to prevent damage to school property. Suspended or expelled students shall be excluded from all school and school-related activities unless otherwise agreed during the period of suspension or expulsion.

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

Involuntary Disenrollment

No student shall be involuntarily disenrolled by the Charter School for any reason unless the parent/guardian of the student has been provided written notice of intent to disenroll the student no less than five school days before the effective date of the action. The written notice shall be in the native language of the student or the student's parent/guardian or, if the student is a foster child or youth or a homeless child or youth, the student's educational rights holder, and shall inform the student, the student's parent/guardian, or the student's educational rights holder of the basis for which the student is being involuntarily disenrolled and the student's right to request a hearing to challenge the involuntary disenrollment. If a parent/guardian, or educational rights holder requests a hearing, the Charter School shall provide a hearing adjudicated by a neutral officer within a reasonable number of days at which the pupil has a fair opportunity to present testimony, evidence, and witnesses and confront and cross-examine adverse witnesses, and at which the pupil has the right to bring legal counsel or an advocate. If the student's parent/guardian, or educational rights holder requests a hearing, the student shall remain enrolled and shall not be disenrolled until the Charter School issues a final decision.

SOCS has adopted an Attendance, Support, and Involuntary Disenrollment Policy. Pursuant to that policy, involuntary disenrollment may be recommended for violation of any of the following non-disciplinary school policies:

- Attendance
- Academic Integrity
- Civility
- Acceptable Use
- Satisfactory Educational Progress

Involuntary disenrollment may also be recommended for any of the following non-disciplinary reasons and consistent with state law:

- Student fails to complete all mandated school assessments.
- Failure to provide documentation and information to the school in order to record attendance in accordance with applicable laws.

- Failure to provide requested documentation for continued enrollment, such as proof of residency.
- Failure to attend and respond to school communications during the first ten (10) school days.

Students with IEPs and/or 504 plans may also be subject to involuntary disenrollments described in this policy. SOCS will comply with all applicable federal and state laws when a special education student is being considered for an involuntary disenrollment.

The procedures for involuntary disenrollment, including re-engagement and the right to request a hearing prior to disenrollment, are set forth in SOCS's Attendance, Support, and Involuntary Disenrollment Policy.

Discipline Procedures

A. Grounds for Suspension and Expulsion of Students

A student may be suspended or expelled for prohibited misconduct if the act is related to school activity or school attendance occurring at any time including but not limited to (a) while on school grounds; (b) while going to or coming from school; (c) during the lunch period, whether on or off the school campus; (d) during, or while going to or coming from a school-sponsored activity.

B. Enumerated Offenses

1. Discretionary Suspension Offenses: Students may be suspended for any of the following acts when it is determined the student:

- a) Caused, attempted to cause, or threatened to cause physical injury to another person.
- b) Willfully used force or violence upon the person of another, except self-defense.
- c) Unlawfully possessed, used, or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind.
- d) Unlawfully offered, arranged, or negotiated to sell a controlled substance as defined in Health and Safety Code Sections 11053-11958, alcoholic beverages, or intoxicant of any kind, and then sold, delivered, or otherwise furnished to any person another liquid, substance, or material and represented the same as a controlled substance, alcoholic beverages, or intoxicant.
- e) Committed or attempted to commit robbery or extortion.
- f) Caused or attempted to cause damage to school property or private property, which includes, but is not limited to, electronic files and databases.
- g) Stole or attempted to steal school property or private property, which includes, but is not limited to, electronic files and databases.
- h) Possessed or used tobacco, or products containing tobacco or nicotine products, including, but not limited to, cigarettes, cigars, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets, and betel. This section does not prohibit the use of his or her own prescription products by a student.

- i) Committed an obscene act or engaged in habitual profanity or vulgarity.
- j) Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.
- k) Disrupted school activities or otherwise willfully defied the valid authority of supervisors, teachers, administrators, school officials, or other school personnel engaged in the performance of their duties. This section shall apply to students in any of grades 9 to 12, inclusive.
- l) Knowingly received stolen school property or private property, which includes, but is not limited to, electronic files and databases.
- m) Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
- n) Harassed, threatened, or intimidated a student who is a complaining witness or a witness in a school disciplinary proceeding for purposes of either preventing that student from being a witness and/or retaliating against that student for being a witness.
- o) Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.
- p) Engaged in, or attempted to engage in hazing. For purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a student organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective student. For purposes of this subdivision, "hazing" does not include athletic events or school-sanctioned events.
- q) Made terroristic threats against school officials and/or school property, which includes but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, which includes but is not limited to, electronic files and databases, or the personal property of the person threatened or his or her immediate family.
- r) Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to students in any of grades 4 to 12, inclusive.
- s) Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to students in any of grades 4 to 12, inclusive.
- t) Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected

effect of materially disrupting class work, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This section shall apply to students in any of grades 4 to 12, inclusive.

- u) Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.
 - 1) "Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:
 - i. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of his or her age, or for a person of his or her age with exceptional needs) or students in fear of harm to that student's or those students' person or property.
 - ii. Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.
 - iii. Causing a reasonable student to experience substantial interference with his or her academic performance.
 - iv. Causing a reasonable student to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by the Charter School.
 - 2) "Electronic Act" means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:
 - i. A message, text, sound, video, or image.
 - ii. A post on a social networking Internet Web site including, but not limited to:
 - (a) Posting to or creating a burn page. A "burn page" means an Internet Web site created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
 - (b) Creating a credible impersonation of another actual student for the purpose of having one or more of the effects listed in subparagraph (1) above. "Credible impersonation" means to knowingly and without consent impersonate a student for the purpose of bullying the student and such that another student would reasonably believe, or has reasonably believed, that the student was or is the student who was impersonated.
 - (c) Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. "False profile" means a profile of a fictitious student or a profile using the likeness or attributes of an actual student other than the student who created the false profile.
 - iii. An act of cybersexual bullying.

- (a) For purposes of this clause, "cybersexual bullying" means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a student to another student or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photograph or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other electronic act.
 - (b) For purposes of this clause, "cybersexual bullying" does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.
- 3) Notwithstanding subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.
- v) A student who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, pursuant to this section, except that a student who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (1)(a)-(b).
 - w) Possessed, sold, or otherwise furnished any knife unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Superintendent or designee's concurrence.

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

2. Non-Discretionary Suspension Offenses: Students must be suspended and recommended for expulsion for any of the following acts when it is determined the student:

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

3. Discretionary Expellable Offenses: Students may be recommended for expulsion for any

of the following acts when it is determined the student:

- a) Caused, attempted to cause, or threatened to cause physical injury to another person.
- b) Willfully used force or violence upon the person of another, except self-defense.
- c) Unlawfully possessed, used, or otherwise furnished, or was under the influence of any controlled substance, as defined in Health and Safety Code Sections 11053-11058, alcoholic beverage, or intoxicant of any kind.
- d) Unlawfully offered, arranged, or negotiated to sell a controlled substance as defined in Health and Safety Code Sections 11053-11958, alcoholic beverage, or intoxicant of any kind, and then sold, delivered, or otherwise furnished to any person another liquid, substance, or material and represented the same as a controlled substance, alcoholic beverage, or intoxicant.
- e) Committed or attempted to commit robbery or extortion.
- f) Caused or attempted to cause damage to school property or private property, which includes, but is not limited to, electronic files and databases.
- g) Stole or attempted to steal school property or private property, which includes, but is not limited to, electronic files and databases.
- h) Possessed or used tobacco, or products containing tobacco or nicotine products, including, but not limited to, cigarettes, cigars, miniature cigars, clove cigarettes, smokeless tobacco, snuff, chew packets, and betel. This section does not prohibit the use of his or her own prescription products by a student.
- i) Committed an obscene act or engaged in habitual profanity or vulgarity.
- j) Unlawfully possessed or unlawfully offered, arranged, or negotiated to sell any drug paraphernalia, as defined in Health and Safety Code Section 11014.5.
- k) Knowingly received stolen school property or private property, which includes, but is not limited to, electronic files and databases.
- l) Possessed an imitation firearm, i.e.: a replica of a firearm that is so substantially similar in physical properties to an existing firearm as to lead a reasonable person to conclude that the replica is a firearm.
- m) Harassed, threatened, or intimidated a student who is a complaining witness or a witness in a school disciplinary proceeding for purposes of either preventing that student from being a witness and/or retaliating against that student for being a witness.
- n) Unlawfully offered, arranged to sell, negotiated to sell, or sold the prescription drug Soma.
- o) Engaged in, or attempted to engage in hazing. For purposes of this subdivision, "hazing" means a method of initiation or preinitiation into a student organization or body, whether or not the organization or body is officially recognized by an educational institution, which is likely to cause serious bodily injury or personal degradation or disgrace resulting in physical or mental harm to a former, current, or prospective student. For purposes of this subdivision, "hazing" does not include athletic events or school-sanctioned events.
- p) Made terroristic threats against school officials and/or school property, which includes but is not limited to, electronic files and databases. For purposes of this section, "terroristic threat" shall include any statement, whether written or oral, by a person who willfully threatens to commit a crime which will result in death, great bodily injury to another person, or property damage in excess of one thousand dollars (\$1,000), with the specific intent that the statement is to be taken as a threat, even if there is no intent of actually carrying it out, which, on its face and under the circumstances in which it is made, is so

unequivocal, unconditional, immediate, and specific as to convey to the person threatened, a gravity of purpose and an immediate prospect of execution of the threat, and thereby causes that person reasonably to be in sustained fear for his or her own safety or for his or her immediate family's safety, or for the protection of school property, which includes but is not limited to, electronic files and databases, or the personal property of the person threatened or his or her immediate family.

- q) Committed sexual harassment, as defined in Education Code Section 212.5. For the purposes of this section, the conduct described in Section 212.5 must be considered by a reasonable person of the same gender as the victim to be sufficiently severe or pervasive to have a negative impact upon the individual's academic performance or to create an intimidating, hostile, or offensive educational environment. This section shall apply to students in any of grades 4 to 12, inclusive.
- r) Caused, attempted to cause, threatened to cause or participated in an act of hate violence, as defined in subdivision (e) of Section 233 of the Education Code. This section shall apply to students in any of grades 4 to 12, inclusive.
- s) Intentionally harassed, threatened or intimidated school personnel or volunteers and/or a student or group of students to the extent of having the actual and reasonably expected effect of materially disrupting class work, creating substantial disorder and invading the rights of either school personnel or volunteers and/or student(s) by creating an intimidating or hostile educational environment. This section shall apply to students in any of grades 4 to 12, inclusive.
- t) Engaged in an act of bullying, including, but not limited to, bullying committed by means of an electronic act.
 - 1) "Bullying" means any severe or pervasive physical or verbal act or conduct, including communications made in writing or by means of an electronic act, and including one or more acts committed by a student or group of students which would be deemed hate violence or harassment, threats, or intimidation, which are directed toward one or more students that has or can be reasonably predicted to have the effect of one or more of the following:
 - i. Placing a reasonable student (defined as a student, including, but is not limited to, a student with exceptional needs, who exercises average care, skill, and judgment in conduct for a person of his or her age, or for a person of his or her age with exceptional needs) or students in fear of harm to that student's or those students' person or property.
 - ii. Causing a reasonable student to experience a substantially detrimental effect on his or her physical or mental health.
 - iii. Causing a reasonable student to experience substantial interference with his or her academic performance.
 - iv. Causing a reasonable student to experience substantial interference with his or her ability to participate in or benefit from the services, activities, or privileges provided by the Charter School.
 - 2) "Electronic Act" means the creation or transmission originated on or off the school site, by means of an electronic device, including, but not limited to, a telephone, wireless telephone, or other wireless communication device, computer, or pager, of a communication, including, but not limited to, any of the following:
 - i. A message, text, sound, video, or image.

- ii. A post on a social networking Internet Web site including, but not limited to:
 - (a) Posting to or creating a burn page. A "burn page" means an Internet Web site created for the purpose of having one or more of the effects as listed in subparagraph (1) above.
 - (b) Creating a credible impersonation of another actual student for the purpose of having one or more of the effects listed in subparagraph (1) above. "Credible impersonation" means to knowingly and without consent impersonate a student for the purpose of bullying the student and such that another student would reasonably believe, or has reasonably believed, that the student was or is the student who was impersonated.
 - (c) Creating a false profile for the purpose of having one or more of the effects listed in subparagraph (1) above. "False profile" means a profile of a fictitious student or a profile using the likeness or attributes of an actual student other than the student who created the false profile.
- iii. An act of cybersexual bullying.
 - (a) For purposes of this clause, "cybersexual bullying" means the dissemination of, or the solicitation or incitement to disseminate, a photograph or other visual recording by a student to another student or to school personnel by means of an electronic act that has or can be reasonably predicted to have one or more of the effects described in subparagraphs (i) to (iv), inclusive, of paragraph (1). A photograph or other visual recording, as described above, shall include the depiction of a nude, semi-nude, or sexually explicit photographs or other visual recording of a minor where the minor is identifiable from the photograph, visual recording, or other electronic act.
 - (b) For purposes of this clause, "cybersexual bullying" does not include a depiction, portrayal, or image that has any serious literary, artistic, educational, political, or scientific value or that involves athletic events or school-sanctioned activities.
- 3) Notwithstanding subparagraphs (1) and (2) above, an electronic act shall not constitute pervasive conduct solely on the basis that it has been transmitted on the Internet or is currently posted on the Internet.
- u) A student who aids or abets, as defined in Section 31 of the Penal Code, the infliction or attempted infliction of physical injury to another person may be subject to suspension, but not expulsion, pursuant to this section, except that a student who has been adjudged by a juvenile court to have committed, as an aider and abettor, a crime of physical violence in which the victim suffered great bodily injury or serious bodily injury shall be subject to discipline pursuant to subdivision (3)(a)-(b).
- v) Possessed, sold, or otherwise furnished any knife unless, in the case of possession of any object of this type, the student had obtained written permission to possess the item from a certificated school employee, with the Superintendent or designee's concurrence.

4. Non-Discretionary Expellable Offenses: Students must be recommended for expulsion

for any of the following acts when it is determined pursuant to the procedures below that the student:

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

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

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

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

C. Procedures for Suspensions of Fewer than 10 days

Suspensions of fewer than 10 days shall be initiated according to the following procedures:

1. Conference:

Suspension shall be preceded, if possible, by a conference conducted by the Superintendent or his/her designee with the student and his or her parent/guardian, and whenever practical, the teacher, supervisor or SOCS employee who referred the student to the Superintendent or designee.

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

At the conference, the student shall be informed of the reason for the disciplinary action and the evidence against him or her and shall be given the opportunity to present his or her version and evidence in his or her defense, in accordance with Education Code Section 47605(c)(5)(j)(i). This conference shall be held within (2) two school days, unless the student waives this right or is physically unable to attend for any reason including, but not limited to, incarceration or hospitalization. No penalties may be imposed on a student for failure of the student's parent/guardian to attend a conference with SOCS officials. Reinstatement of the suspended student shall not be contingent upon attendance by the student's parent/ guardian at the conference.

2. Notice to Parents/Guardians

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

3. Suspension Time Limits/Recommendation for Expulsion

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

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

4. Homework Assignments During Suspension

In accordance with Education Code Section 47606.2(a), upon the request of a parent, a legal guardian or other person holding the right to make education decisions for the pupil, or the affected pupil, a teacher shall provide to a pupil in any of grades 1 to 12, inclusive, who has been suspended from school for two or more schooldays, the homework that the pupil would otherwise have been assigned.

In accordance with Education Code Section 47606.2(b), if a homework assignment that is requested pursuant to Section 47606.2(a) and turned into the teacher by the pupil either upon the pupil's return to school from suspension or within the timeframe originally prescribed by the teacher, whichever is later, is not graded before the end of the academic term, that assignment shall not be included in the calculation of the pupil's overall grade in the class.

D. Authority to Expel

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

E. Procedures for Expulsions or Suspensions of 10 Days or More

Students recommended for suspensions of 10 days or more (hereinafter referred to as "extended suspensions") or expulsion are entitled to a hearing to determine whether the student should be expelled. Unless postponed for good cause, the hearing shall be held within a reasonable period of time after the Superintendent or designee recommends student for expulsion or an extended suspension.

The Superintendent or designee shall appoint a neutral hearing officer to preside over the hearing. The hearing officer may be an individual who is recognized as an educational leader in their community but is not employed by Charter School, or someone with previous experience as a neutral hearing officer, as determined in the sole discretion of the Superintendent or designee. The Superintendent or designee's decision to appoint a hearing officer is final.

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

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

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

The Charter School may, upon a finding of good cause, determine that the disclosure of either the identity of the witness or the testimony of that witness at the hearing, or both, would subject the witness to an unreasonable risk of psychological or physical harm. Upon this determination, the testimony of the witness may be presented at the hearing in the form of sworn declarations that shall be examined only by the Charter School or the hearing officer. Copies of these sworn declarations, edited to delete the name and identity of the witness, shall be made available to the student.

1. The complaining witness in any sexual assault or battery case must be provided with a copy of the applicable disciplinary rules and advised of his/her right to (a) receive five days notice of his/her scheduled testimony, (b) have up to two (2) adult support persons of his/her choosing present in the hearing at the time he/she testifies, which may include a parent, guardian, or legal counsel, and (c) elect to have the hearing closed while testifying.
2. SOCS must also provide the victim a room separate from the hearing room for the complaining witness's use prior to and during breaks in testimony.
3. At the discretion of the entity conducting the hearing, the complaining witness shall be allowed periods of relief from examination and cross-examination during which he or she may leave the hearing room.
4. The entity conducting the expulsion hearing may also arrange the seating within the hearing room to facilitate a less intimidating environment for the complaining witness.
5. The entity conducting the expulsion hearing may also limit time for taking the testimony of the complaining witness to the hours he/she is normally in school, if there is no good cause to take the testimony during other hours.
6. Prior to a complaining witness testifying, the support persons must be admonished that the hearing is confidential. Nothing in the law precludes the entity presiding over the hearing from removing a support person whom the presiding person finds is disrupting the hearing. The entity conducting the hearing may permit any one of the support persons for the complaining witness to accompany him or her to the witness stand.
7. If one or both of the support persons is also a witness, SOCS must present evidence that the witness's presence is both desired by the witness and will be helpful to the Charter School. The entity presiding over the hearing shall permit the witness to stay unless it is established that there is a substantial risk that the testimony of the complaining witness would be influenced by the support person, in which case the presiding official shall admonish the support person or persons not to prompt, sway, or influence the witness in any way. Nothing shall preclude the presiding officer from exercising his or her discretion to remove a person from the hearing whom he or she believes is prompting, swaying, or influencing the witness.
8. The testimony of the support person shall be presented before the testimony of the complaining witness and the complaining witness shall be excluded from the courtroom during that testimony.
9. Especially for charges involving sexual assault or battery, if the hearing is to be conducted in public at the request of the student being expelled, the complaining witness shall have the right to have his/her testimony heard in a closed session when testifying at a public meeting would threaten serious psychological harm to the complaining witness and there

are no alternative procedures to avoid the threatened harm. The alternative procedures may include videotaped depositions or contemporaneous examination in another place communicated to the hearing room by means of closed-circuit television.

10. Evidence of specific instances of a complaining witness' prior sexual conduct is presumed inadmissible and shall not be heard absent a determination by the entity conducting the hearing that extraordinary circumstances exist requiring the evidence be heard. Before such a determination regarding extraordinary circumstances can be made, the witness shall be provided notice and an opportunity to present opposition to the introduction of the evidence. In the hearing on the admissibility of the evidence, the complaining witness shall be entitled to be represented by a parent/guardian, legal counsel, or other support person. Reputation or opinion evidence regarding the sexual behavior of the complaining witness is not admissible for any purpose.

G. Record of Hearing

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

H. Presentation of Evidence

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

I. Written Notice

The Superintendent or designee, following a decision of the hearing officer, shall send written notice of the decision, including the hearing officer's findings of fact, to the student or parent/guardian. This notice shall also include the following: (a) Notice of the specific offense committed by the student; (b) Notice of the student's or parent/guardian's obligation to inform any new district in which the student seeks to enroll of the student's status with the Charter School; and (c) the parent/guardian's right to petition the governing board for an appeal.

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

J. Disciplinary Records

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

K. Petition to Appeal an Expulsion

The parent/guardian shall have the right to petition the Charter School governing board to reverse a decision to expel. The petition shall be made in writing within 10 calendar days of the written notice to expel and must at a minimum explain the reasons why the governing board should reverse the decision to expel and a description of all supporting facts.

Upon receipt of the petition, the governing board may:

- 1) deny the petition;
- 2) request more information from either party in the form of oral testimony to the governing board in a closed session or written responses;
- 3) instruct the Superintendent and/or designee to cure any procedural defects in the process, potentially including direction to conduct another hearing with a different hearing officer if necessary; or
- 4) reverse the decision to expel.

The Charter School governing board's decision on a petition to appeal an expulsion shall be final.

The parent/guardian shall have no right to appeal the decision regarding an extended suspension.

L. Expelled students/Alternative Education

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

M. Rehabilitation Plans

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

N. Readmission

The decision to readmit a student or to admit a previously expelled student from another school district or charter school shall be in the sole discretion of SOCS's governing board following a

meeting with the Superintendent or designee and the student and parent/guardian or representative to determine whether the student has successfully completed the rehabilitation plan and to determine whether the student poses a threat to others or will be disruptive to the school environment. The Superintendent or designee shall make a recommendation to SOCS's governing board following the meeting regarding his or her determination. The Board shall then make a final decision regarding readmission during the closed session of a public meeting, reporting out any action taken during closed session consistent with the requirements of the Brown Act. The student's readmission is also contingent upon SOCS capacity at the time the student seeks readmission.

O. Notice to Teachers

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

P. Special Procedures for the Consideration of Suspension and Expulsion of Students with Disabilities

1. Notification of SELPA

SOCS will immediately notify the SELPA and coordinate the procedures in this policy with the SELPA of the discipline of any student with a disability or student who SOCS or SELPA would be deemed to have knowledge that the student had a disability.

2. Services During Suspension

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

3. Procedural Safeguards/Manifestation Determination

Within ten (10) school days of a recommendation for expulsion or any decision to change the placement of a student with a disability because of a violation of a code of student conduct, SOCS, the parent/guardian, and relevant members of the IEP/504 Team shall review all relevant information in the student's file, including the student's IEP/504 Plan, any teacher observations, and any relevant information provided by the parents/guardians to determine:

- a. If the conduct in question was caused by, or had a direct and substantial relationship to, the student's disability; or
- b. If the conduct in question was the direct result of the local educational agency's failure to implement the IEP/504 Plan.

If SOCS, the parent/guardian, and relevant members of the IEP/504 Team determine that either of the above is applicable for the student, the conduct shall be determined to be a manifestation of the student's disability.

If SOCS, the parent, and relevant members of the IEP/504 Team make the determination that the conduct was a manifestation of the student's disability, the IEP/504 Team shall:

- a. Conduct a functional behavioral assessment and implement a behavioral intervention plan for such student, provided that SOCS had not conducted such assessment prior to such determination before the behavior that resulted in a change in placement;
- b. If a behavioral intervention plan has been developed, review the behavioral intervention plan if the student already has such a behavioral intervention plan, and modify it, as necessary, to address the behavior; and
- c. Return the student to the placement from which the student was removed, unless the parent/guardian and SOCS agree to a change of placement as part of the modification of the behavioral intervention plan.

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

4. Due Process Appeals

The parent/guardian of a student with a disability who disagrees with any decision regarding placement, or the manifestation determination, or SOCS if it believes that maintaining the current placement of the student is substantially likely to result in injury to the student or to others, may request an expedited administrative hearing through the Special Education Unit of the Office of Administrative Hearings or by utilizing the dispute provisions of the 504 Policy and Procedures.

When an appeal relating to the placement of the student or the manifestation determination has been requested by either the parent/guardian or SOCS, the student shall remain in the interim alternative educational setting pending the decision of the hearing officer in accordance with state and federal law, including 20 U.S.C. Section 1415(k), until the expiration of the forty-five (45) day time period provided for in an interim alternative educational setting, unless the parent/guardian and SOCS agree otherwise.

In accordance with 20 U.S.C. Section 1415(k)(3), if a parent/guardian disagrees with any decision regarding placement, or the manifestation determination, or if the Charter School believes that maintaining the current placement of the student is substantially likely to result in injury to the student or to others, the parent/guardian or Charter School may

request a hearing.

In such an appeal, a hearing officer may: (1) return a student with a disability to the placement from which the student was removed; or (2) order a change in placement of a student with a disability to an appropriate interim alternative educational setting for not more than 45 school days if the hearing officer determines that maintaining the current placement of such student is substantially likely to result in injury to the student or to others.

5. Special Circumstances

SOCS personnel may consider any unique circumstances on a case-by-case basis when determining whether to order a change in placement for a student with a disability who violates a code of student conduct.

The Superintendent or designee may remove a student to an interim alternative educational setting for not more than forty-five (45) school days without regard to whether the behavior is determined to be a manifestation of the student's disability in cases where a student:

- a. Carries or possesses a weapon, as defined in 18 U.S.C. Section 930, to or at school, on school premises, or to or at a school function;
- b. Knowingly possesses or uses illegal drugs, or sells or solicits the sale of a controlled substance, while at school, on school premises, or at a school function;
or
- c. Has inflicted serious bodily injury, as defined by 20 U.S.C. Section 1415(k)(7)(D), upon a person while at school, on school premises, or at a school function.

6. Interim Alternative Educational Setting:

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

7. Procedures for Students Not Yet Eligible for Special Education Services:

A student who has not been identified as an individual with disabilities pursuant to IDEA and who has violated the District's disciplinary procedures may assert the procedural safeguards granted under these procedures only if SOCS had knowledge that the student was disabled before the behavior occurred.

SOCS shall be deemed to have knowledge that the student had a disability if one of the following conditions exists:

- a. The parent/guardian has expressed concern in writing, or orally if the parent/guardian does not know how to write or has a disability that prevents a written statement, to SOCS supervisory or administrative personnel, or to one of the student's teachers, that the student is in need of special education or related services; or

- b. The parent/guardian has requested an evaluation of the student; or
- c. The student's teacher, or other SOCS personnel, has expressed specific concerns about a pattern of behavior demonstrated by the student directly to the Assistant Director of Special Education or to other Charter School supervisory personnel.

If SOCS knew or should have known the student had a disability under any of the three (3) circumstances described above, the student may assert any of the protections available to IDEA- eligible children with disabilities, including the right to stay put.

If SOCS had no basis for knowledge of the student's disability, it shall proceed with the proposed discipline. SOCS shall conduct an expedited evaluation if requested by the parents/guardians; however, the student shall remain in the education placement determined by SOCS pending the results of the evaluation.

The Charter School shall not be deemed to have knowledge that the student had a disability if the parent has not allowed an evaluation, refused services, or if the student has been evaluated and determined to not be eligible.

ELEMENT 11: EMPLOYEE RETIREMENT SYSTEMS

Governing Law: The manner by which staff members of the charter schools will be covered by the State Teachers' Retirement System, the Public Employees' Retirement System, or federal social security. – California Education Code Section 47605(c)(5)(K)

Faculty will participate in the federal social security system as required by law and will have access to their Charter School-sponsored retirement plans according to policies developed and adopted by the Board of Directors. The Board will determine by board action to participate in California's State Teachers' Retirement System ("STRS") or an Internal Revenue Code Section 403(b) plan or equivalent with employer contribution for its eligible staff, and plans to offer an Internal Revenue Code Section 403(b) plan with an employer contribution or other comparable benefits plan in conjunction with Social Security for all other staff. Teachers and staff may also have access to other school-sponsored retirement plans according to policies developed by the Charter School's governing board for Charter School employees. The Superintendent will be responsible for ensuring appropriate arrangements are made for the available employee retirement coverage.

If the governing board chooses STRS in accordance with Education Code Section 47611.3, the County shall create any reports required by STRS. At the County's request, the Charter School shall pay the County a reasonable fee for the provision of such services. SOCS retains the option for its governing board to choose to participate in STRS, Public Employees' Retirements System or Social Security depending upon employee eligibility and what the Board determines is in the best interest of the staff and the Charter School as a whole. This determination will be reflected in SOCS's personnel policies and employment handbook and will be presented to employees prior to their employment with the Charter School.

ELEMENT 12: STUDENT ATTENDANCE ALTERNATIVES

Governing Law: The public school attendance alternatives for students residing within the school district who choose not to attend charter schools. – California Education Code Section 47605(c)(5)(L)

No student is required to attend SOCS. Students who do not attend the Charter School may attend school within their local school district of residence or pursue an inter- or intra-district transfer in accordance with existing enrollment and transfer policies of their school district or county of residence.

Parents/guardians of each student enrolled in SOCS will be informed on admissions forms that the student has no right to admission in a particular school of any local educational agency as a consequence of enrollment at SOCS, except to the extent that such a right is offered by the local educational agency.

ELEMENT 13: RETURN RIGHTS DISTRICT EMPLOYEES

Governing Law: The rights of an employee of the school district upon leaving the employment of the school district to work in a charter school, and of any rights of return to the school district after employment at a charter school. – California Education Code Section 47605(c)(5)(M)

No public school district employee shall be required to work at the Charter School. Members of SOCS staff who leave employment in the District to work at SOCS shall not have any automatic rights of return to the District after employment by the Charter School, without prior consent specifically granted by the District through a leave of absence or other agreement. Charter School employees shall have any right upon leaving the District to work in the Charter School that the District may specify, any rights of return to employment in a school district after employment in the Charter School that the District may specify, and any other rights upon leaving employment to work in the Charter School that the District determines to be reasonable and not in conflict with any law.

Employees who were not previous employees of the District will not become employees of the District and will not have the right to employment within the District upon leaving the employment of Charter School.

District employees cannot be required to work at SOCS, nor can the District require the Charter School to hire District employees, with the exception of District employees provided to the Charter School as part of an agreement for services paid to the District by SOCS under a separately negotiated agreement or memorandum of understanding.

Charter School employees are not subject to District transfers without written consent of that employee.

Sick or vacation leave or years of service credit at the District or any other school district will not

be transferred to the Charter School. Employment by the Charter School provides no rights of employment at any other entity, including any rights in the case of closure of the Charter School.

ELEMENT 14: DISPUTE RESOLUTION

Governing Law: The procedures to be followed by the charter school and the chartering authority to resolve disputes relating to provisions of the charter. – California Education Code Section 47605(c)(5)(N)

SOCS will adopt policies and processes for aiding and resolving internal and external disputes.

Intent

The intent of this dispute resolution process is to (1) resolve disputes within the Charter School pursuant to the Charter School's policies, (2) minimize the oversight burden on the District as the Charter School's authorizer, (3) ensure a fair and timely resolution of disputes, and (4) frame a charter oversight and renewal process and timeline so as to avoid disputes regarding oversight and renewal matters.

The staff and governing board members of SOCS and the Helendale School District agree to resolve all disputes regarding this charter pursuant to the terms of this section.

Disputes Arising From Within the School

Disputes over personnel discipline will not be covered by this dispute resolution process, and instead, will be resolved through the Charter School's personnel policies and procedures. SOCS shall maintain comprehensive personnel policies and procedures, approved by the SOCS governing board that will be provided to each employee upon hire. These policies will set forth personnel obligations, rights, responsibilities, complaint procedures, discipline procedures, and other pertinent policies essential to preserving a safe and harmonious work environment. The Superintendent will resolve complaints and will administer any personnel discipline.

SOCS shall establish and provide a Uniform Complaint Policy and Procedures as required by state law. This procedure may be used to resolve internal disputes among parents/guardians, students, Board members, volunteers, and staff at the Charter School, and each shall be provided with a copy of the Charter School's policies and internal dispute resolution process. The District agrees to refer all complaints regarding the Charter School's operations to the SOCS Superintendent for resolution in accordance with the Charter School's adopted policies.

Disputes Between the Charter School and The District

In the event that Charter School and the District have disputes regarding the terms of this charter or any other issue regarding the Charter School, both parties agree to follow the process outlined below.

In the event of a dispute between the Charter School and the District, both parties agree to first

frame the issue in writing (“Written Notification”) and refer the issue to the District Superintendent and the Charter School’s Executive Director, or their respective designees. In the event the District Superintendent believes the dispute relates to an issue that could lead to revocation of the charter in accordance with Education Code Section 47607, SOCS requests that this shall be specifically noted in the Written Notification, although it recognizes it cannot legally bind the District to do so. However, participation in the dispute resolution procedures outlined in this section shall not be interpreted to impede or act as a prerequisite to the District’s ability to proceed with the revocation procedures in accordance with Education Code Section 47607 and its implementing regulations.

- a. **Meet and Confer:** Upon receipt of the Written Notification, the Charter School Superintendent and the District Superintendent, or their respective designees, shall informally meet and confer in a timely fashion to attempt to resolve the dispute, no later than five (5) business days from receipt of the Written Notification. In the event that this informal meeting is unsuccessful, both parties shall identify two board members from their respective boards who shall jointly meet with the Superintendent of the District and the Superintendent of the Charter School and attempt to resolve the dispute within fifteen (15) business days from receipt of the Written Notification.
- b. **Mediation:** If the dispute cannot be resolved at the informal meet and confer or the joint meeting, the parties shall schedule a mediation to resolve the matter. The parties shall mediate in good faith. The mediator shall be selected by mutual agreement of the parties. Each party shall bear its own attorneys’ fees, costs, and expenses associated with the mediation. The mediator’s fees and the administrative fees of the mediation shall be shared equally among the parties. Mediation proceedings shall be held within 60 business days of receipt of the Written Notification.

If mediation does not resolve the dispute either party may pursue any other remedy available under the law. All timelines and procedures in this section may be revised upon mutual written agreement of the District and the Charter School

ELEMENT 15: PROCEDURES FOR CLOSURE

Governing Law: The procedures to be used if the charter school closes. The procedures shall ensure a final audit of the charter school to determine the disposition of all assets and liabilities of the charter school, including plans for disposing of any net assets and for the maintenance and transfer of student records. – California Education Code Section 47605(c)(5)(O)

Closure of the Charter School will be documented by official action of the Board of Directors. The action will identify the reason for closure. The official action will also identify an entity and person or persons responsible for closure-related activities.

In the event the Charter School closes, SOCS will promptly notify staff, parents/guardians, and students of the Charter School, the District, the San Bernardino County Office of Education, the Charter School’s SELPA, the retirement system in which the Charter School’s employees participate, and the California Department of Education, in writing, as far in advance as possible. This notice shall include:

- The effective date of the closure;
- The name(s) of and contact information for the person(s) to whom reasonable inquiries may be made regarding the closure;
- The students' school districts of residence; and
- The manner in which parents/guardians may obtain copies of student records, including specific information on completed courses and credits that meet graduation requirements.

The Charter School will ensure that the notification to the parents and students of the Charter School of the closure provides information to assist parents and students in locating suitable alternative programs. This notice will be provided promptly following the Board's decision to close the Charter School. The Charter School will ensure that the notification to the parents and students of the Charter School of the closure provides information to assist parents and students in locating suitable alternative programs. This notice will be provided promptly following the Board's decision to close the Charter School. The Charter School website will provide links to resident school district enrollment/transfer procedures if these are published online (limited to the home districts of currently enrolled students).

The Charter School will also develop a list of pupils in each grade level and the classes they have completed, together with information on the pupils' districts of residence, which it will provide to the entity responsible for closure-related activities.

As applicable, the Charter School will provide parents/guardians, students, and the District with copies of all appropriate student records, and will otherwise assist students in transferring to their next school. SOCS will maintain student records and personnel records for a term and in a manner consistent with applicable federal and state law. The Charter School will ask the District to store original records of Charter School students. All student records of the Charter School shall be transferred to the District upon Charter School closure. If the District will not or cannot store the records, the Charter School shall work with the County Office of Education to determine a suitable alternative location for storage.

All state assessment results, special education records, and personnel records will be transferred to and maintained by the entity responsible for closure-related activities in accordance with applicable law.

As soon as reasonably practical, the Charter School will prepare final financial records. The Charter School will also have an independent audit completed within six months after closure. The Charter School will pay for the final audit. The audit will be prepared by a qualified Certified Public Accountant selected by the Charter School and will be provided to the District promptly upon its completion. The final audit will include an accounting of all financial assets, including cash and accounts receivable and an inventory of property, equipment, and other items of material value, an accounting of the liabilities, including accounts payable and any reduction in apportionments as a result of audit findings or other investigations, loans, and unpaid staff compensation, and an assessment of the disposition of any restricted funds received by or due to the Charter School.

The Charter School will complete and file any annual reports required pursuant to Education Code

section 47604.33.

On closure of the Charter School, all assets of the Charter School, including but not limited to all leaseholds, personal property, intellectual property, and all ADA apportionments and other revenues generated by students attending the Charter School, remain the sole property of the Charter School and, upon the dissolution of the nonprofit public benefit corporation, shall be distributed in accordance with the Articles of Incorporation. Any assets acquired from the District or District property will be promptly returned upon Charter School closure to the District. The distribution shall include return of any grant funds and restricted categorical funds to their source in accordance with the terms of the grant or state and federal law, as appropriate, which may include submission of final expenditure reports for entitlement grants and the filing of any required Final Expenditure Reports and Final Performance Reports, as well as the return of any donated materials and property in accordance with any conditions established when the donation of such materials or property was accepted.

On closure, the Charter School shall remain solely responsible for all liabilities arising from the operation of the Charter School.

As the Charter School is operated by a non-profit public benefit corporation, should the corporation dissolve with the closure of the Charter School, the Board will follow the procedures set forth in the California Corporations Code for the dissolution of a non-profit public benefit corporation and file all necessary filings with the appropriate state and federal agencies.

The Charter School will utilize the reserve fund to undertake any expenses associated with the closure procedures identified above. The governing board will allocate sufficient funding for, or otherwise determine how Charter School will fund these closure activities.

MISCELLANEOUS CHARTER PROVISIONS

Governing Law: The petitioner or petitioners also shall be required to provide financial statements that include a proposed first-year operational budget, including startup costs, and cashflow and financial projections for the first three years of operation. Education Code Section 47605(h).

1) Budgets

A financial plan for the Charter School, including a projected operational budget, cash flow, and financial projection for three years of operation, is attached as Exhibit D. This plan is based on the best data available to the petitioners at the time the plan was assembled.

2) Financial Reporting

Financial Systems and Processes

SOCS has an internal business and fiscal department that takes care of accounting and fiscal reporting. The Charter School contracts with an accounting firm for statutory federal and state tax filing.

Financial Reports

The Charter School shall provide reports to the District and County Superintendent of Schools as follows in accordance with Education Code Section 47604.33, and shall provide additional fiscal reports as requested by the District:

1. By July 1, a preliminary budget for the current fiscal year.
2. By July 1, a local control and accountability plan and an annual update to the local control and accountability plan required pursuant to Education Code Section 47606.5.
3. By December 15, an interim financial report for the current fiscal year reflecting changes through October 31. Additionally, on December 15, a copy of the Charter School's annual, independent financial audit report for the preceding fiscal year shall be delivered to the District, State Controller, California Department of Education and County Superintendent of Schools.
4. By March 15, a second interim financial report for the current fiscal year reflecting changes through January 31.
5. By September 15, a final unaudited report for the full prior year. The report submitted to the District shall include an annual statement of all the Charter School's receipts and expenditures for the preceding fiscal year.

The Charter School will provide all reports to the District as required by law and as requested by the District including, but not limited to, the following: California Basic Educational Data System ("CBEDS"), actual Average Daily Attendance reports, all financial reports required by Education Code Sections 47604.33 and 47605(m), the School Accountability Report Card (SARC), and the LCAP.

The Charter will implement an attendance recording and accounting system which complies with state law and the District's requirements.

The Charter anticipates applying for the Charter School Revolving Loan Fund. If it does so, SOCS understands that it must comply with Education Code Section 41365 if it receives funds.

SOCS will be a direct-funded charter school and anticipates depositing its funds in a non-speculative and federally insured bank account for use by the Charter School.

The Charter School agrees to and submits to the right of the District to make random visits and inspections in order to carry out its statutorily required oversight in accordance with Education Code Sections 47604.32 and 47607.

Pursuant to Education Code Section 47604.3, the Charter School shall promptly respond to all reasonable inquiries including, but not limited to, inquiries regarding its financial records from the District.

3) Insurance

Insurance Certificates

SOCS shall keep on file certificates signed by an authorized representative of the Charter School's insurance carrier. The District reserves the right to require complete certified copies of the required insurance policies. Required insurance includes Commercial General Liability, Commercial Auto Liability, Worker's Compensation, Property and Fire, and Errors and Omissions. All insurance requirements are specified in the MOU between SOCS and the District.

Optional Insurance

Should SOCS deem it prudent and/or desirable to have insurance coverage for damage or theft to Charter School, employee or student property, for student accident, or any other type of insurance coverage not listed above, such insurance shall not be provided by the District and its purchase shall be the responsibility of the Charter School.

5) Administrative Services

Governing Law: The manner in which administrative services of the charter school are to be provided. Education Code Section 47605(h).

The Charter School will provide or procure its own administrative services including, but not limited to, financial management, accounts payable/receivable, payroll, human resources, and instructional program development either through its own staff or through an appropriately qualified third-party contractor.

Pursuant to California law, the District will be required to provide certain oversight duties, including monitoring Charter School and student performance data, reviewing the Charter School's financial statements and audit reports, performing annual site visits, engaging in the dispute resolution process, and considering charter amendments and renewal requests.

SOCS will coordinate with the county to report pertinent STRS payroll data if STRS is used. The County Office of Education may request a reasonable fee for coordinating this transfer of data. The Charter School shall maintain its own health and benefits by contracting with an insurance broker or similar third party to enroll in appropriate health and wellness insurance plans (e.g., Kaiser, Blue Cross, Cigna, etc.).

6) Facilities

Governing Law: The facilities to be utilized by the charter school. The description of the facilities to be used by the charter school shall specify where the charter school intends to locate. – California Education Code Section 47605(h).

The Charter School is operated in an independent study environment. As such, minimal facility usage is required. SOCS will maintain a central administrative office wherein important student and personnel records are maintained. The central office is located at 27274 Peach Tree Ln, Helendale, CA 92342. The central office is located at 1473 Ford Street, STE 105, Redlands CA 92373. This location is used for administrative purposes and other similar types of activities. In addition to a central administrative office, SOCS will maintain a central warehouse to facilitate the in and outbound logistics of student curriculum, technology, and supplies. Many of our programs meet either virtually or in mutually agreed upon public locations every twenty days with no resource center needed. SOCS shall ensure that any other resource center, meeting space, or other satellite facility established by the Charter School shall be in compliance with all applicable requirements of Education Code Section 47605.1.

7) Transportation

As an independent study program, SOCS does not provide any home-to-school or school-to-home transportation services; however, SOCS will ensure that students with IEPs that require such transportation services receive them. SOCS may occasionally arrange for public, rented, or parental transportation for field trip-type excursions and learning opportunities.

8) Potential Civil Liability Effects

Governing Law: Potential civil liability effects, if any, upon the charter school and upon the school district. – California Education Code Section 47605(h).

SOCS is operated by a California nonprofit public benefit corporation. This corporation is organized and operated exclusively for charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code and the California Revenue and Taxation Code Section 23701(d).

Pursuant to Education Code Section 47604(d), an authority that grants a charter to a charter school operated by or as a non-profit public benefit corporation shall not be liable for the debts or obligations of the charter school, or for claims arising from the performance of acts, errors, or omissions by the charter school if the authority has complied with all oversight responsibilities required by law. The Charter School shall work diligently to assist the District in meeting any and all oversight obligations under the law, including monthly meetings, reporting, or other District-requested protocol to ensure the District shall not be liable for the operation of the Charter School.

Further, the Charter School intends to enter into a memorandum of understanding with the District, wherein the Charter School shall indemnify the District for the actions of the Charter School under this charter.

The corporate bylaws of the Charter School shall provide for indemnification of the Charter School's Board, officers, agents, and employees, and the Charter School will purchase general liability insurance, Board Members and Officers insurance, and fidelity bonding to secure against financial risks.

The Charter School intends to maintain liability, property, and errors and omissions insurance as

outlined above to protect the Charter School's assets, staff, governing board members, and, where appropriate, the district from unforeseen liability. Insurance amounts shall be determined by recommendation of the District and the Charter School's insurance broker for schools of similar size, location, and student population. The District shall be named an additional insured on the general liability insurance of the Charter School.

The Charter School Board shall institute appropriate risk management practices as discussed herein, including screening of employees, establishing codes of conduct for students, and dispute resolution.

9) Financial Management and School Services Contracts

Financial Management

SOCS's Superintendent will be responsible for overseeing the Charter School under policies adopted by SOCS's governing board. As described further below, the Charter School may contract with a back office provider and a student information systems software such as School Pathways (as a student information systems and state reporting provider) for all or some of its operational, administrative, and financial services.

The back office provider and student information system used shall demonstrate a track record of experience with virtual/independent study public schools, and will meet the Charter School's service needs based on mandatory state data tracking and reporting requirements.

Material Contracts

SOCS may contract the following material agreements for services:

- An agreement for payroll processing services.
- An agreement for accounting and tax services.
- An agreement with an independent financial auditor that meets the certification and licensure requirements for conducting an independent financial audit of California public schools.
 - This agreement will be made upon terms and conditions that are standard for the industry and will ensure a legally compliant annual audit of SOCS's finances.
- An agreement for curriculum with Edgenuity, or another state-approved curriculum, to supply SOCS's online instructional program.
- An agreement with approved vendors to supply curriculum for the home school program.
- An agreement for student information systems with School Pathways or another high-quality student information system.
- An agreement for back-office services
- An agreement for an interactive online meeting space with Blackboard Collaborative.
- An agreement for Tech Support for faculty and students.
- An agreement for Website design and maintenance.
- Any other agreement for systems or software to facilitate the operations of SOCS.

GENERAL PROVISIONS OF THE PROPOSED CHARTER

Term

The term of this Charter shall be July 1, 2024 – June 30, 2031. This Charter may be renewed for one or more subsequent terms between five (5) and seven (7) years, in accordance with Education Code Sections 47607 and 47607.2, upon mutual agreement of the parties.

Revisions

Material revisions of this Charter may be made in writing with the mutual consent of the District and the SOCS governing board. Material revisions shall be made pursuant to the standards, criteria, and timelines set forth in Education Code Sections 47605 and 47607.

Miscellaneous

The Charter School intends to enter into a mutually agreeable MOU with the Helendale School District, which outlines further details of the relationship between the District and the Charter School. The MOU may include, but not be limited to, the following:

- transportation and food services to be provided by the District, if any
- services to be purchased by the Charter School from the District, and the fee schedule for such services
- details of the oversight and monitoring relationship between the Charter School and the District
- mutual indemnification from loss
- cash advances to handle cash flow issues, if necessary
- Charter School's receipt of mandated cost reimbursement
- fiscal reporting requirements to the state, either independently or through the District
- District support for the Charter School in seeking additional funding

Communication and Notices

All official communication between the Charter School and the District will be sent via first class mail or other appropriate means to the Charter School Superintendent and the Superintendent of the District.

Coversheet

(Action) Approval of Memorandum of Understanding between Sage Oak Charter School and the Helendale School District

Section: XII. Business Services
Item: B. (Action) Approval of Memorandum of Understanding between Sage Oak Charter School and the Helendale School District
Purpose: Vote
Submitted by:
Related Material: Memorandum of Understanding between Sage Oak Charter School and the Helendale School District_8.8.2024.pdf

BACKGROUND:

On June 26, 2024, the Helendale School District Governing Board unanimously approved the Memorandum of Understanding between Sage Oak Charter School and the Helendale School District.

RECOMMENDATION:

It is recommended the Board approve the Memorandum of Understanding between Sage Oak Charter School and the Helendale School District, effective July 1, 2024, through June 30, 2031.

**MEMORANDUM OF UNDERSTANDING BETWEEN THE
HELENDALE SCHOOL DISTRICT AND SAGE OAK
CHARTER SCHOOL**

Effective 7/1/2024 - 6/30/2031

The governing board of the Helendale School District ("District") granted a charter petition ("Charter") to Sage Oak Charter School ("School" or "Charter School") pursuant to the terms of the Charter Schools Act of 1992, as amended. This Charter, among other matters, calls for the District and School to enter into a mutually agreeable memorandum of understanding ("Agreement") regarding the funding entitlements of the School pursuant to the Charter Schools Act. The School and District intend to use this Agreement as the basis for developing similar understandings in future fiscal years.

This Agreement shall serve to clarify the status of the School and define the responsibilities of the parties. This Agreement provides for oversight, direct and indirect services to be provided by the District to the School and the remuneration to be paid by the School to the District. Education Code section 47607(a)(2) provides the procedure for a material revision of an existing charter. To the extent that this Agreement is inconsistent with any of the terms of the Charter, the Charter shall supersede the terms of this Agreement. Both Parties agree to meet in good faith to negotiate necessary changes to align the Charter and the Agreement.

I. PURPOSE OF THIS MEMORANDUM OF UNDERSTANDING

- A. Outline specific funding sources anticipated to be available to the School.
- B. Define the oversight responsibility and services the District will provide to the School.
- C. Clarify the responsibilities of each party.

II. TERM

- A. This Agreement is valid for the term of the Charter granted to Sage Oak Charter School, from July 1, 2024, through June 30, 2031. It may be modified or terminated with the written mutual consent of the governing bodies of the District and School.
- B. This Agreement is automatically terminated if the School's charter is revoked or non-renewed in compliance with Education Code Section 47604.5 or 47607, or rescinded by the Charter School.

III. CHARTER SCHOOL AUTHORITY

- A. The School, in performing its duties and obligations under this Agreement and its Charter, shall have the power and authority, consistent with federal and state law and subject to other terms and conditions of this Agreement to:
 - 1. Contract for goods and services with the District and/or any third party.
 - 2. Prepare a budget.
 - 3. Perform the personnel services not otherwise assumed by the District as outlined herein.
 - 4. Procure insurance.
 - 5. Lease or otherwise contract with any third party for the use of facilities for school purposes and the operation and maintenance thereof; Purchase, lease, or rent furniture, equipment, and supplies.
 - 6. Accept and expend gifts, donations, or grants of any kind in accordance with such conditions prescribed by the donor as are consistent with law and not contrary to

- any of the terms of this Agreement.
7. Perform the business administration of the School.
 8. Establish and conduct an educational program and curriculum for the School as provided in the School's charter.
 9. Conduct extra and co-curricular activities and programs.
 10. Conduct professional development for all administrators, instructional personnel, and non-instructional personnel.
 11. Select and acquire instructional materials, equipment, and supplies.
 12. Exercise such other powers as are provided for elsewhere in this Agreement to the extent consistent with this Agreement.
 13. Generally, take such other actions as may be necessary or desirable to properly and efficiently operate the School.
 14. Engage in any activity not prohibited by applicable law or the terms of its Charter.

IV. ORGANIZATIONAL STRUCTURE

- A. The School shall be governed by an incorporated non-profit public benefit corporation ("Corporation") with the opportunity to contract for specific services and operational support from the District, public or private organizations, and/or management companies. The administrator of the School shall conduct the day-to-day operations of the School by the power delegated to him/her by the School's governing board. All powers, rights and obligations not otherwise reserved herein to the District are hereby delegated to the School consistent with its Charter, any policies and procedures, this Agreement, and all applicable laws. The School should be allowed to carry on any activity in order to effectuate its goal of educating students that is not inconsistent with an express provision of its Charter or applicable law.
- B. In accordance with applicable California laws and the Act, the Corporation shall designate and maintain a Corporate Board of Directors and Corporate Officers. Directors of the School shall be selected and appointed in accordance with the corporate bylaws of the School. The District shall have the authority to appoint one voting board member.
- C. As a publicly supported public benefit corporation, the School recognizes its responsibility to promote public access to its deliberation and documents. Therefore, the School Board of Directors may comply with the Ralph M. Brown Act (Gov. Code §§ 6450, et seq.) and all other statutes specifically applicable to charter schools operated as nonprofit corporations.
- D. All employees of the Charter will be employees of the Sage Oak Charter School and not employees of the District. The Charter School Board of Directors shall adopt and the administrator shall implement Employment Agreements, Personnel Reviews, and other policies and procedures to further the Charter School's goals as outlined in the Charter.
- E. The Charter School shall be solely responsible for all costs and expenses related to the Charter and its operation, including but not limited to, costs of insurance, reserves, staff and operations.
- F. The Charter School shall have no authority to enter contracts for or on behalf of the District. Any contracts, purchase orders, or other documents shall be the Charter School's sole responsibility.

V. FUNDING

- A. As established by Education Code Section 47630 *et seq.*, the Charter School shall receive funding under the charter school funding model as follows:
 1. General purpose entitlement computed by the local control funding formula pursuant to Education Code Section 42238.02, as implemented by Education Code

Section 42238.03.

2. General purpose funding that consists of state aid, local property taxes, and other revenues applied toward a school district's local control funding formula, pursuant to Education Code Section 42238.02, as implemented by Education Code Section 42238.03.
3. Lottery funds, pursuant to Education Code Section 47638.
4. Class size reduction funds (if applicable), a variety of state and federal application-based programs, as well as various grant opportunities. Except as otherwise noted in this Agreement, it shall be the responsibility of the Charter School to apply for funding that is beyond the basic statutory entitlement.
5. Any additional funds negotiated between the District and the Charter School in accordance with Education Code Section 47636.
 - a. In addition to LCFF, the parties recognize the authority of the Charter School to pursue additional sources of funding.
 - b. The Charter School has elected to receive funding from the State directly, pursuant to Education Code Section 47651.
 - c. The District shall transfer funding in lieu of property taxes to the Charter School in monthly installments by no later than the fifteenth of each month in accordance with Education Code Section 47635.
 - d. The School may apply for and receive loans from the District, and/or public or private agencies independently from the District. The District shall not be liable for the repayment of any principal, interest, penalties, or legal cost associated with such loans. Should the District or the School loan funds to the other entity, the Parties will enter into a separate written agreement.
 - e. Banking Arrangements: The Charter School shall maintain an account at a federally insured commercial bank or credit union. The Charter School will deposit all funds received as soon as practical upon receipt.
 - f. Payroll Service: The Charter School may contract with any reputable, bonded, and insured payroll contractor to prepare payroll checks, tax and retirement withholdings, tax statements and to perform other payroll support functions.
 - g. The Charter School agrees to provide the District with full general purpose entitlement and categorical block grant apportionment funds for any Helendale School District student(s) enrolled in Charter School, while still providing services to any such student(s).

VI. BOND FUNDS

- A. The Charter School expressly waives any right to share in general obligation or construction bonds that have been or may be passed by the voters of the Helendale School District.

VII. LEGAL RELATIONSHIP

- A. The Parties recognize that the Charter School is a separate legal entity. The Charter School shall be operated by a non-profit public benefit corporation under Education Code Section 47604. As such, in accordance with Education Code Section 47604(c), if the District complies with all oversight responsibilities required by law, the District shall not be liable for the debts or obligations of the Charter School or for claims arising from the performance of acts, errors, or omissions by the Charter School.
- B. With respect to its operations under this Agreement, the District and the Charter School shall, to the fullest extent permitted by law, hold harmless, indemnify, and defend each

other, their officers, their trustees, directors, and employees from and against any and all claims, demands, actions, suits, losses, liability expenses and costs arising under this Agreement including, without limitation, attorneys' fees and costs arising out of injury to any persons, including death or damage to any property caused by, connected with, or attributable to their willful misconduct, negligent acts, errors or omissions of their directors, trustees, officers, employees, agents and consultants under this Agreement. The District shall be named as an additional insured under all insurance carried on behalf of the Charter School.

VIII. DISTRICT OVERSIGHT

- A. In consideration for the actual costs of supervisory oversight by the District, the Charter School shall pay an amount not to exceed one percent (1%) of the revenue of the Charter School (hereinafter, the "Oversight Fee") pursuant to Education Code section 47613. "Supervisory oversight" for purposes of this section shall be limited to those duties listed in Education Code section 47604.32(a)(1) through (5), only. "Revenue" for purposes of this calculation shall include the general-purpose entitlement calculated pursuant to Education Code section 47633, and the categorical block grant calculated pursuant to Education Code section 47634. "Revenue" for purposes of this calculation shall not include Charter School fund-raising activities, private donations, other public grants, or any other source of income developed by the Charter School. Payment by the Charter School shall be made in accordance with the provisions of Paragraph XVI below. These costs are in addition to, and not in lieu of, other costs set forth herein.
- B. Charter School and the District agree that "supervisory oversight," as used in Education Code Section 47613 and Education Code Section 47604.32, shall include the following:
1. All activities related to the Charter revocation and renewal and processes as described in Education Code Section 47607.
 2. Activities relating to monitoring the performance and compliance of the Charter School with respect to the terms of its Charter, related agreements, and all applicable laws.
 3. Participate in the dispute resolution process described in the Charter.
 4. Review and timely response to the Charter School's Annual Independent Fiscal and Performance Audit.
 5. Select a representative to act as a liaison to the charter school.
 6. Visit the Charter School at least annually.
 7. Monitor the fiscal condition of the Charter School.
- C. Provide timely notification to the California Department of Education if any of the following circumstances occur:
1. A renewal of the charter is granted or denied.
 2. The charter is revoked.
 3. The Charter School will cease operation for any reason.

IX. SERVICES

- A. In addition to the supervisory oversight responsibilities and the standard one percent (1%) oversight fee, the District shall also provide the Charter School with the following services which shall be compensated as outlined below:
1. Substantially rent-free facilities for use by the Charter School: The District will provide classrooms, offices, and technology to the Charter School, allowing the Charter School use of this space for professional development, remote teaching lessons, and office functions. The Superintendent, Senior Director of Outreach and Development and other designated staff will have access to collaborate with District

administration. The Charter School will have access to any and all educational resources located in the provided classrooms, as well as office supplies, and technology support needed. All terms, conditions, and obligations related to the use of these facilities and resources will be specified in a facilities use agreement that the District will initiate and provide.

2. Administrative or other services: The Charter School will have access to District instructional materials and other resources throughout the school year, including on-campus technology support needed during the course of instruction.
 3. In-service training opportunities: Charter School staff will be eligible to participate in District-provided in-service training opportunities, similar to District staff, as deemed applicable to the Charter School.
- B. To compensate the District for the costs of the additional services and facilities, the District may charge the Charter School an amount not to exceed two percent (2.0%) of the Charter School's revenue (as defined in Education Code section 47632(a) and (b)), in addition to the standard one percent (1%) oversight fee. This brings the total fee to up to three percent (3.0%) of the Charter School's revenue.
- C. Fee Structure Cap: To ensure financial predictability for the Charter School, the District will introduce a cap on the fee structure. The cap will be placed using the 2024-25 school year Charter School revenue (as defined in Education Code section 47632(a) and (b)). This cap will ensure that the total dollar amount charged does not increase based on the Charter School's projected increasing enrollment, providing stability and support for both institutions. This clause may be renegotiated if there is an undue hardship on either party.

X. SPECIAL EDUCATION SERVICES

- A. It is understood that this Agreement covers only the delivery of special education services under the Individuals with Disabilities Education Act (IDEA) and implementing California laws and regulations. This Agreement does not cover services or accommodations required under Section 504 of the Rehabilitation Act or under the Americans with Disabilities Act (ADA).
- The School agrees to assume responsibility for compliance with Section 504 and ADA.
- B. The School shall act as its own Local Education Agency (LEA) in the Special Education Local Planning Area (SELPA) and the School is responsible for compliance with the Individuals with Disabilities Education Act (20 U.S.C. Sec. 1400 et seq.). As an independent LEA in a SELPA, the School receives special education funds in the manner specified in the allocation plan of the SELPA.

XI. DATA REPORTING

- A. The School has designated its reporting status with the California Department of Education as an "independently reporting charter school," meaning the School independently reports its CALPADS and CBEDS data directly to the California Department of Education without the need for the District to review, certify, and submit the School's CALPADS or CBEDS data. The School will maintain its status as an independently reporting charter school throughout the term of this Agreement.
- B. Average Daily Attendance (ADA). The School will develop an attendance-reporting calendar and maintain a system to record and account for ADA in the manner above specified. The School will report ADA figures to the District for annual reporting and when requested, and the District will be given data after the completion of the most current learning period.
- C. California Basic Education Data System Enrollment (CBEDS). The School shall complete and submit enrollment and other necessary demographic information to the CBEDS.
- D. Other Data: The District and School shall work cooperatively to supply any other information necessary to enable the School and District to calculate entitlement to

all available funding sources.

- E. State Testing: The School shall submit as required all data related to the mandated State testing programs.

XII. BUDGET AND FINANCE

- A. The School shall prepare and submit the following financial information to the District and County Superintendent of Schools:
1. On or before July 1, a preliminary budget. For a charter school in its first year of operation, the information submitted pursuant to Education Code Section 47605(g) satisfies this requirement.
 2. On or before July 1, an annual update (Local Control and Accountability Plan) required pursuant to Education Code Section 47606.5.
 3. On or before December 15, an interim financial report. This report shall reflect changes through October 31.
 4. On or before March 15, a second interim financial report. This report shall reflect changes through January 31.
 5. On or before September 15, a final unaudited report for the full prior year.
 - a. Written contemporaneous records that document all revenues received by the School, from all sources.
 - b. The District shall provide all necessary backup data in its possession.
 - c. The School shall promptly respond to all reasonable inquiries regarding its financial records (Education Code Section 47604.3).

XIII. AUDIT

- A. The School will contract and pay for an independent annual audit of the School's financial affairs. The audit will verify the accuracy of the School's financial statements, reporting practices and amounts paid to the District. The audit will be conducted in accordance with generally accepted accounting principles applicable to public schools and in compliance with the audit provisions of the Charter.
- B. The Charter School Board of Directors will review any audit exceptions or deficiencies and determine the means for resolving any such exceptions or deficiencies. Audit exceptions must be resolved to the satisfaction of the District governing board and in accordance with the procedures detailed in the Charter and Education Code Section 47605(b)(5)(1).

XIV. INSURANCE AND RISK MANAGEMENT

- A. The Charter School will, at its own expense, provide and maintain insurance policies for the operation of the Charter School, including but not limited to general liability, property, and errors and omission policies.
- B. The District shall be named as an additional insured under all insurance carried on behalf of the Charter School.
- C. The Charter School shall provide the District with certificates of insurance upon request by the District.

XV. MATERIAL REVISION OF THE CHARTER

- A. Any Material Revision, as this term is defined below, to the Charter may be made only with District's approval. The Charter School may submit to the District any proposed Material Revision to the Charter in accordance with the District's policies and procedures that are in effect at the time of the submission.
- B. Material Revision Defined. Changes to the Charter that constitute a Material Revision

include, but are not limited to, the following (each referred to as a "Material Revision" and collectively referred to as "Material Revisions"):

1. Change in the legal status (i.e. changing from a nonprofit public benefit corporation to a for-profit or non-incorporated entity), or ownership of the Charter School.
2. Substantive change to Charter School's mission statement.
3. Elimination of any grade levels that Charter School is required to serve or expansion to serve any grade levels that are not in accordance with the Charter.
4. Change in Charter School's calendar affecting the number of days of instruction that Charter School is required to provide pursuant to the Charter and state law.
5. Change in Charter School's admissions requirements or enrollment preferences from those set forth in the Charter.
6. Substantive change to Charter School's educational program (i.e. moving from non-classroom-based to classroom-based except as required by law or upon written approval by the District).

C. Non-Material Revision. A Non-Material Revision, as this term is defined in this Section, may be made effective by Charter School through written notification to the District. A "Non-Material Revision" includes, but is not limited to, the following:

1. Change to Charter School's mailing address, telephone, and/or facsimile number.
2. Change of the individual who serves as a Party's Authorized Representative.
3. Amendment to the bylaws of Charter School (where Charter School is operated as a Public nonprofit benefit corporation) provided that the amendment is non-substantive.
4. Non-substantive change to Charter School's educational program in terms of either content or methodology as required by law or upon written approval by the District.
5. Addition, deletion, or relocation of existing resource centers; (However, The Charter School will inform/notify the District Superintendent (or designee) in writing before opening a new learning center or student facility.
6. Change of management or structure of the Board, including the composition of the Board (i.e., the addition or reduction of board members)

XVI. PAYMENT SCHEDULE

- A. In accordance with the provision of Ed Code Section 47635, the District shall provide the Charter School it's in-lieu of property tax funding. The District shall annually transfer to each of its charter schools funding in lieu of property taxes equal to the greater of the following two amounts:
1. The average amount of property taxes per unit of Average Daily Attendance (ADA), including ADA attributable to charter schools, received by the local educational agency, multiplied by the charter school's ADA.
 2. The statewide average general-purpose funding per unit of ADA received by school districts, as determined by the State Department of Education, multiplied by the charter school's ADA in each of the four corresponding grade level ranges: kindergarten and grades 1, 2, and 3; grades 4, 5, and 6; grades 7 and 8; and grades 9 to 12, inclusive.
- B. The sponsoring local educational agency shall transfer funding in lieu of property taxes to the charter school in monthly installments, by no later than the 15th of each month.
1. For the months of August to February, inclusive, a charter school's funding in lieu of property taxes shall be computed based on the amount of property taxes received by the sponsoring local educational agency during the preceding fiscal year, as reported to

the Superintendent of Public Instruction for purposes of the second principal apportionment. A sponsoring local educational agency shall transfer to the charter school the charter school's estimated annual entitlement to funding in lieu of property taxes as follows:

- a. Six percent in August.
 - b. Twelve percent in September.
 - c. Eight percent each month in October, November, December, January, and February.
- C. For the months of March to June, inclusive, a charter school's funding in lieu of property taxes shall be computed based on the amount of property taxes estimated to be received by the sponsoring local educational agency during the fiscal year, as reported to the Superintendent of Public Instruction for purposes of the first principal apportionment. A sponsoring local educational agency shall transfer to each of its charter schools an amount equal to one-sixth of the difference between the school's estimated annual entitlement to funding in lieu of property taxes and the amounts provided pursuant to paragraph (1). An additional one-sixth of this difference shall be included in the amount transferred in the month of March.
- D. For the month of July, a charter school's funding in lieu of property taxes shall be computed based on the amount of property taxes estimated to be received by the sponsoring local educational agency during the prior fiscal year, as reported to the Superintendent of Public Instruction for purposes of the second principal apportionment. A sponsoring local educational agency shall transfer to each of its charter schools an amount equal to the remaining difference between the school's estimated annual entitlement to funding in lieu of property taxes and the amounts provided pursuant to paragraphs (1) and (2).
- E. Final adjustments to the amount of funding in lieu of property taxes allocated to a charter school shall be made in February, in conjunction with the final reconciliation of annual apportionments to schools.
- F. Subdivision (A) and paragraphs (A) to (D), inclusive, of subdivision (B) do not apply to pupils who reside in, and are otherwise eligible to attend a school in, a basic aid school district, but who attend a charter school in a non-basic aid school district. With regard to these pupils, the sponsoring basic aid district shall transfer to the charter school an amount of funds equivalent to the revenue limit earned through average daily attendance by the charter school for each pupil's attendance, not to exceed the average property tax share per unit of average daily attendance for pupils residing and attending in the basic aid district. The transfer of funds shall be made in not fewer than two installments at the request of the charter school, the first occurring not later than February 1 and the second not later than June 1 of each school year. Payments shall reflect the average daily attendance certified for the time periods of the first and second principal apportionments, respectively. The Superintendent of Public Instruction may not apportion any funds for the attendance of pupils described in this subdivision unless the amount transferred by the basic aid district is less than the revenue limit earned by the charter school, in which event the Superintendent of Public Instruction shall apportion the difference to the charter school from state funds.
- G. The Charter School shall pay the administrative services fees, supervisory oversight fees, and all other fees no later than the last day of the fiscal year or June 30th each school year.

XVII. MISCELLANEOUS

- A. Amendments, Modification and Supplements. Amendments, modifications, and supplements to this Agreement are allowed and will be binding on the parties after the effective date provided such amendments, modifications, and supplements (1) are in writing, signed by authorized representatives of both parties and (2) by reference incorporate this Agreement and identify the specific sections or clauses contained herein which are amended, modified, and supplemented or indicate that the material is new. The

- term, "this Agreement" shall be deemed to include any future amendments, modifications, and supplements.
- B. Assignment. Neither party may assign or delegate its obligations under this Agreement without the prior written consent of the other.
- C. Attorney's Fees. In the event any party to the Agreement shall be required to initiate legal proceedings (i) to interpret or to enforce performance of any term or condition of their Agreement; (ii) to enjoin any action prohibited hereunder; or (iii) to gain any other form of relief whatsoever, the prevailing party shall be entitled to recover such sums, in addition to any other damages or compensation received, as will reimburse the prevailing party for reasonable attorneys' fees and court costs incurred on account thereof notwithstanding the nature of the claim or cause of action asserted by the prevailing party.
- D. Compliance with Laws and Regulations. The parties shall comply with all federal, state, and local laws and regulations applicable to their performance as described in this Agreement.
- E. Consent. Where consent, approval, or mutual agreement is required of a party, it shall not be unreasonably withheld or delayed.
- F. Default. If either party refuses or fails, in any material respect to properly perform its obligations under this Agreement, or violates any of the material terms or conditions of the Agreement, such refusal, failure, or violation, shall constitute default. In such event, the non-defaulting party may so notify the other party in writing of the default and allow that party a period of thirty (30) calendar days to cure such default. If the defaulting party does not cure such default within said thirty (30) calendar days; the non-defaulting party shall have the right to terminate this Agreement upon written notice to the other party. Termination of this Agreement shall not equate to revocation of the charter which may only be accomplished in accordance with Education Code Section 47607 and its implementing regulations. Notwithstanding rights provided through this clause, all service fees for the current month and previously certified student attendance shall still be due and payable per the terms of this Agreement. If such default is for failure of the District to pay service fees that have already been transferred to the District from State or other granting entity, then the District shall only be granted a period of ten (10) working days to cure such default.
- G. Charter Revocation. Should either the California State Board of Education, San Bernardino County Office of Education or the District revoke the Charter managed under this agreement, this Agreement shall be canceled. All remaining ongoing financial obligations of the Parties shall remain in effect beyond revocation of the Charter until those obligations are fulfilled.
- H. Entire Agreement. Except for written amendments, supplements or modifications made after the execution of this Agreement, this Agreement and its attachments represent the entire agreement between the parties hereto with respect to the subject matter of this Agreement and supersede all prior renegotiations, representations and agreements, either oral or written.
- I. Forces Outside the Control of the Parties (Force Majeure). In the event performance of this Agreement, or any obligations hereunder, is prevented, restricted or interfered with by reason of acts of God, wars, revolution, civil commotion, acts of public enemy, embargo, acts of the government in its sovereign capacity, labor difficulties, including without limitation, strikes, slowdowns, picketing or boycotts, unavailability of equipment from vendors, or any other circumstances beyond the reasonable control and without the fault or negligence of the party affected, the party affected, upon giving prompt notice to the other party, shall be excused from such performance on a day-to-day basis to the extent of such prevention restriction, or interference (and the other party shall be excused from such performance on a day-to-day basis until the delay, restriction or interference has ceased), provided, however, that the party so affected shall use its best reasonable efforts to avoid

and remove such cause of nonperformance and both parties shall proceed whenever such causes are removed or cease.

- J. Severability. If any provision or any part of this Agreement is for any reason held to be invalid and/or unenforceable or contrary to public policy, law, or statute and/or ordinance, the remainder of this Agreement shall not be affected and shall remain valid and fully enforceable.
- K. Governing Law. This Agreement shall be governed by and interpreted or construed in accordance with the laws of the State of California, County of San Bernardino.
- L. Headings. The headings in this Agreement are inserted for convenience and identification only and are in no way intended to define or limit the scope, extend, or intents of this Agreement or any of the provisions hereof.
- M. Independent Contractor Relationship. Each party shall remain an independent contractor with respect to the other and shall be responsible for compliance with all laws, rules and regulations involving, but not limited to, employment of labor, hours of labor, health and safety, working conditions and payment of wages. The persons provided by each party shall be solely that party's employees and shall be under the sole and exclusive direction and control of that party. They shall not be considered employees of the other party for any purposes.
- N. Taxes and Assessments. Each party shall be responsible for payment of taxes, including federal, state and municipal taxes, chargeable or assessed with respect to its employees, such as Social Security, unemployment, worker's compensation, disability insurance, and federal and state withholding.
- O. Insolvency. Either party may terminate this Agreement by notice, in writing, if the other party admits insolvency, makes an assignment for the benefit of creditors, or has a trustee or receiver appointed over all or any substantial part of its assets.
- P. Successors. This Agreement shall be binding on and inure to the benefit of the respective successors and permitted assigns of the parties.
- Q. Notifications. All notices, requests and other communications under this Agreement shall be in writing and mailed to the proper addresses as follows:

<p>To the District at:</p> <p>Helendale School District 5350 Riverview Road Helendale, CA 92342</p>	<p>To the Charter at:</p> <p>Sage Oak Charter School 1473 Ford Street STE 105 Redlands, CA 92723</p>
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IN WITNESS WHEREOF, the parties agree to execute this Agreement

Helendale School District

By: Gene Palmer

Date: 6/28/24

Sage Oak Charter School

By: _____

Date: _____

Approved and ratified this _____ day of _____, by the Board of Directors of Sage Oak Charter School by the following vote:

AYES:

NAYS:

ABSTAINS:

By: _____

Coversheet

(Action) Approval of 2024-2025 Superintendent/CEO Evaluation Timeline and Plan

Section: XIII. Human Resources
Item: A. (Action) Approval of 2024-2025 Superintendent/CEO Evaluation
Timeline and Plan
Purpose: Vote
Submitted by:
Related Material:
2024-2025 Superintendent of Schools_CEO Evaluation Timeline and Plan_8.8.2024.pdf

2024-25 Superintendent of Schools/CEO Evaluation Timeline



Coversheet

Annual Board of Directors' Self-Evaluation

Section: XIV. Oral Presentations
Item: A. Annual Board of Directors' Self-Evaluation
Purpose: Discuss
Submitted by:
Related Material: Annual Board of Directors' Self-Evaluation_DRAFT_8.8.2024.pdf
Review_Superintendent_CEO Succession Plan_8.8.2024.pdf
Review_Board Succession Plan_8.8.2024.pdf



Annual Board of Directors' Self-Evaluation 2023 - 2024

Issue/Concept	Complete	In Progress	Little/No Progress	Not Applicable
A Solid Foundation				
School has a well-drafted charter contract with its sponsoring agencies.	WH MH SH PM SF			
School has well-drafted articles and bylaws.	WH MH SH PM SF			
School's legal and financial status are clear and well understood.	WH MH SH PM SF			
Appropriate liability insurance and risk management practices are maintained at all times.	WH MH SH PM SF			
School has developed a long-term /strategic plan such as a WASC report that is reviewed and revised on an annual basis.	WH MH SH PM SF			
Long-term plans are translated into annual action plans/goals in a document such as the LCAP.	WH MH SH PM SF			
Board Operations/Relations				
Board members understand their legal and ethical responsibilities	WH MH			

(duty of care/loyalty, conflict of interest).	SH PM SF			
New board members are oriented and fully briefed prior to being seated.	SH PM	MH WH		SF
Board is composed of individuals with a broad and appropriate range of expertise and experience. Board seeks outside counsel for matters beyond its expertise.	WH MH SH PM SF			
Board member selection process ensures a board and appropriate range of expertise and experience.	SH SF	PM MH WH		
Board conducts annual self-evaluation.	WH MH SH PM SF			
Meetings are well planned with clear agendas focused on appropriate policy and action items.	WH MH SH PM SF			
Board president is a strong, capable meeting facilitator.	MH SH PM SF	WH		
Board president has developed meeting norms.	MH SH PM SF	WH		
Meetings are conducted pursuant to common ground rules (eg. Robert's Rules) that are well understood by all members.	WH MH SH PM SF			
Individual board members prepare for meetings and participate constructively.	WH MH SH PM SF			
Meeting minutes record each board meeting and are distributed promptly on the school's website after each meeting.	WH MH SH PM SF			

Relationship w/ CEO				
Board develops performance goals and evaluates CEO performance each year.	WH MH SH PM SF			
Board has clear understanding with staff regarding where board responsibility should be to support and maximize the functioning of the schools.	WH SH PM SF	MH		
Board has established a plan for succession in the event the CEO leaves/retires.	MH SH SF	WH PM		
Personnel and Staffing				
Board has adopted/approved a comprehensive set of personnel policies that are in line with all applicable state/federal laws & regulations. Policies are updated and an annual review will be conducted.	WH MH SH PM SF			
Clear job descriptions and staffing plans are in place.	WH MH SH PM SF			
Budget and Finance				
Board adopts an annual budget that maximizes the school's resources in support of mission/vision.	WH MH SH PM SF			
Board monitors the budget throughout the year via monthly updates, first interim budget and second interim budget.	WH MH SH PM SF			
Board contracts with an independent auditor each year, reviews the audit report, and takes any needed follow-up action.	WH MH SH PM SF			
Board has adopted a three-year financial plan in coordination with the school's overall three-year plan (WASC, LCAP).	WH MH SH PM SF			

Board has adopted a comprehensive set of fiscal management and control policies.	WH MH SH PM SF			
Instruction, Curriculum, and Assessment				
Board has adopted/approved the school's curriculum and instructional programs.	WH MH SH PM SF			
Board has adopted/approved student achievement goals/standards.	WH MH SH PM SF			
A broad-based assessment system is in place to measure progress toward instructional goals/standards.	WH MH SH PM SF			
The Instructional program is in alignment with the state requirements and terms of charter.	WH MH SH PM SF			
Student assessment data is assembled in a comprehensive, coherent fashion, presented to the board, and reviewed and analyzed in-depth on a regular basis.	WH MH SH PM SF			
School reports on student achievement to charter granting agencies on a regular basis as part of the ongoing oversight and renewal process.	WH MH SH PM SF			

Board Member Comments on Strengths:

W. HALL-

- Certainly the Board recognizes its fiduciary responsibilities as well as its role to ensure our students are afforded the best education possible. That being said, we also recognize that the manifestation of these responsibilities is due to the diligence and professionalism of the leadership and staff of Sage Oak Schools.

S. HOULE-

- The Board has a collaborative relationship with staff and the community.
- The Board has established strong communication by asking detailed and hard questions, as well as, contributing views from past experiences.
- The Board is comprised of educators and each member has varied experiences.

- The Board is data savvy.
- The Board is united as a team and shares common beliefs and values for a high-performing school.
- The Board is committed to high student achievement.

M. HUMPHREY-

-

P. MATZ-

- There is a laser-like focus among all Board members on meeting the needs of the staff and students at Sage Oak. All recommendations presented to the Board are thoroughly evaluated through this lens. There is a tremendous sense of pride felt by Board members and appreciation as well for the stellar work done by the entire Sage Oak staff.

S. FRAIRE-

- Outstanding leadership, organization, and teamwork! Sage Oak is a true model for others to follow. A superior and positive learning environment. Always keeping student well-being, family collaboration, and intervention as a top focus. The entire team is to be commended for their hard work and dedication!

Board Member Comments on Areas of Growth and Future Needs:

W. HALL-

- Continue discussions regarding recruiting potential Board members and establish a process for Board input as well as that of Sage Oak Leadership.
- Review procedures in the event of our CEO's absence due to health, family emergency, or retirement.

S. HOULE-

- Continue allocating resources to meet student and community needs.
- Continue monitoring and embracing school data for continuous improvements.
- Continue having open communication with the Superintendent and staff.

M. HUMPHREY-

-

P. MATZ-

- Progress has been made with respect to defining the process for replacing Board members as well as the succession plan for our talented Superintendent, but further clarity is still desired.

S. FRAIRE-

- Continue to keep the unique communication and resources together. Also, the vision to look down the road for possible new Board members.

Superintendent/CEO Succession Planning

Short-Term Absence Procedures

The Board should follow the procedures listed below in the event the Superintendent/CEO is temporarily unable to fulfill their duties.

1. **Immediate Notification:** The Superintendent/CEO or Director of Human Resources will inform the Board President as soon as possible about the temporary incapacity or absence and will support the Board with communication, as directed by the Board President
2. **Special Board Meeting:** As needed, convene a Special Board meeting to discuss the situation and potential impact.
3. **Acting Superintendent/CEO:** Consult with Human Resources for the name of the Superintendent's/CEO's recommended Acting Superintendent/CEO.
4. **Review and Monitor:** The situation should be reviewed at regular intervals to decide if the Acting Superintendent/CEO should continue in the role or if the regular Superintendent/CEO can resume duties.
5. **Transition Back:** Once the Superintendent/CEO resumes duties, a transition plan should be established to ensure a smooth return.

Vacancy Procedures

This section provides a guide for the Board of Directors in case the seat of the Superintendent/CEO becomes vacant, either through planned or unplanned circumstances. This ensures the continuity of leadership and minimizes disruption in the organization.

Superintendent/CEO Succession Planning *(continued)*

1. **Initial Notice:** The Superintendent/CEO should provide written notice of departure as stipulated in their contract, including a minimum notice period.
2. **Board Meeting:** Convene a Special Board Meeting to initiate a plan and timeline for the vacancy. Document minutes and ensure compliance with public meeting laws like the Brown Act.
3. **Search Committee:** Appoint an ad hoc Superintendent/CEO Search Committee consisting of less than a quorum of the Board's Directors with the support of other staff as appropriate, such as the Director of Human Resources. Define the committee's scope, authority, and limitations in writing. Consider and decide whether the Search Committee will conduct the search itself or employ a recruiter or search firm to help find candidates. If using a recruiter/search firm, the Search Committee will be its primary point of contact and will guide the search outside of full Board meetings.
4. **Interviews and Selections:** Establish unbiased, pre-defined criteria for candidate assessment. Conduct interviews and select a candidate based on these criteria. Keep detailed records for compliance with Equal Employment Opportunity laws.
5. **Contract Development:** Involve legal counsel to draft and review the employment contract. Ensure alignment with state and federal employment laws.
6. **Public Announcement:** In the open session of a Regular Board Meeting, the Board President or Director of Human Resources will verbally summarize the employment contract's salary and benefits provisions for the Board and the public before the Board votes to approve the contract.
7. **Transition Plan:** Develop a comprehensive transition plan for both outgoing and incoming Superintendent/CEO

Article VI. Board of Directors- Election

Section 6.04 Election of Directors

Unless an alternative process is adopted or implemented by the Board, candidates shall be nominated, evaluated and elected as follows:

- a. The Board will appoint an advisory committee to identify qualified candidates for election to the Board and will endeavor to appoint the committee at least thirty (30) days before any election of Director(s). The committee will prepare and provide the Board a list of qualified candidates nominated by the committee and will endeavor to complete and provide the Board such list at least seven (7) days before the election or at such other time as the Board may direct. If available at the time, the Secretary shall also provide the Board with a copy of the list when sending notice of the meeting at which the election will be held, or as soon as possible thereafter.
- b. Directors shall be elected by a majority vote of the Directors then in office, typically at the Board's annual meeting. All Directors shall have full voting rights.

Article VI. Board of Directors - Terms & Vacancies

Section 6.05 Terms of Office

With the exception of the initial Board that served five-year terms, each Director shall hold office for a three-year term, but the Board may designate a particular Director to serve a one-, two- or three-year term in order to maintain staggered terms on the Board. Each incumbent Director shall serve until a successor has been elected and seated by the Board. There shall be no limitation on the number of consecutive terms to which a Director may be re-elected.

Section 6.06 Events Causing Vacancies on Board

A vacancy on the Board shall be deemed to exist if a Director dies, resigns, is removed, or if the authorized number of Directors is increased. The Board may declare vacant the office of a Director who has been declared of unsound mind by a final order of court, convicted of a felony, or found by a final order or judgment of any court to have breached any duty arising under Article 3 of Chapter 2 of the California Nonprofit Public Benefit Corporation Law. Vacancies on the Board shall be filled by the vote of a majority of Directors then in office. Each Director so elected shall hold office until the expiration of the term of the replaced Director and until a successor has been duly elected and seated by the Board.

Section 6.07 Removal

Any Director may be removed at any time by a majority vote of the Board, with or without cause.

Article VI. Board of Directors - Resignations

Section 6.08 Resignation

Subject to Section 5226 of the California Nonprofit Public Benefit Corporation Law, any Director may resign effective upon giving written notice to the Superintendent/Chief Executive Officer and the Board President, or the Board as a whole, unless the notice specifies a later time for the effectiveness of such resignation. If the resignation is effective at a future time, a successor may be elected before then to take office when the resignation becomes effective. No Director may resign when the Corporation would then be left without at least one (1) Director in charge of its affairs.

Coversheet

Sage Oak Charter Schools Strategic Plan 2024-2027 Update

Section: XIV. Oral Presentations
Item: B. Sage Oak Charter Schools Strategic Plan 2024-2027 Update
Purpose: Discuss
Submitted by:
Related Material: Sage Oak Charter Schools Strategic Plan 2024-2027_8.8.2024.pdf



SAGE OAK STRATEGIC PLAN



STUDENT SUCCESS



ENGAGEMENT



SMART LEARNING SYSTEMS

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Mission

Educating students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives.

Vision

Sage Oak students embrace their unique potential and are inspired to positively impact their communities.

Core Values

With students always at the forefront, we are *SAGE*, and we value
Service | Accountability | Growth Mindset | Excellence

- *Service* – We value relationships and understand that we are here to provide a high level of service to our students, parents, community, and one another.
- *Accountability* – We build trust with educational partners by staying compliant with state and federal regulations while operating with integrity and transparency.
- *Growth Mindset* – We focus on working hard, learning continuously, and pushing ourselves to reach new heights. We stay current on best practices, educational trends and strive to offer innovative and engaging opportunities for our students.
- *Excellence* – We strive for a standard of excellence in all that we do. We equip students and staff with the necessary tools, resources, and support to help them achieve their full potential.

Introduction & Process

At Sage Oak Charter Schools, our mission is to educate students through a personalized and collaborative learning approach, empowering them to lead purposeful and productive lives. This three-year strategic plan is a testament to our commitment to putting students at the forefront of everything we do. Rooted in our core values of Service, Accountability, Growth Mindset, and Excellence, this plan outlines our vision for creating an educational environment where every student can thrive. By valuing relationships, maintaining integrity, embracing continuous learning, and striving for excellence, we aim to provide an unparalleled educational experience that prepares our students for the challenges and opportunities of the future.

Our strategic plan is designed to bring this mission to life through three key priorities: enhancing student success, fostering engagement, and developing smart learning systems. We are dedicated to providing personalized learning pathways that integrate career, community, and life skills, ensuring that each student is equipped to achieve their full potential. By fostering a culture of connectedness and professional growth, we will support the well-being and development of our staff, enabling them to deliver the highest level of service to our students and community. Through the innovative use of technology and data-driven strategies, we will create a resilient and efficient educational system that aligns with our mission and values, positioning Sage Oak as a leader in educational excellence and innovation.

The unified strategic plan was developed by incorporating feedback from educational partners, aligning with our LCAP initiatives, and integrating insights from our six-year WASC accreditation. Collaboration with the WASC committee shaped many goals within the plan. Parent Advisory and English Learner Advisory Committees highlighted the importance of experiential learning, strong teacher-student relationships, and support for non-English speakers, leading to strategies focused on college readiness, MTSS enhancement, and continuous staff development. Surveys from parents, students, and teachers emphasized the need for a supportive educational climate and robust curriculum. Regular leadership planning meetings and feedback sessions with the executive team aligned the plan with metrics, prioritizing student achievement. This collaborative approach ensured Sage Oak's strategies and goals reflect the community's needs, demonstrating our commitment to inclusivity and excellence.



	PRIORITIES	STRATEGIES	METRICS
<p>STUDENT SUCCESS</p>	<p>To improve academic performance and College and Career Readiness for all students, we will implement comprehensive, grade-appropriate College and Career Readiness programs. This initiative will cultivate the confidence, skills, and spirit of innovation necessary for each student to confidently navigate their unique paths, enabling them to make a meaningful impact in their communities and the world. (Reworded to integrate academic performance with college and career readiness - LCAP required)</p> <p>CPSELs: 1, 2, 4, 5, 6, 7, 8</p>	<ol style="list-style-type: none"> a. Integrate career, community, and life skills into comprehensive K-12 pathways. b. Refine a personalized, data-informed multi-tiered system of support for all students.. c. Improve math proficiency for students with disabilities (SWD) by increasing the percentage of students with disabilities participating in math interventions (NEW-LCAP required due to SWD in Sage Oak being in the red) d. Increase the percentage of students making progress toward proficiency as measured by the state language proficiency assessment and increase English learner reclassification rate by increasing synchronous instruction access. (NEW-LCAP required due to over having 30 EL students- new requirement for any school who has over 30) e. Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates. (NEW-WASC driven) 	<ul style="list-style-type: none"> ● % Students completing A-G pathways and CTE pathways ● % Students achieving a score of 3 or higher on AP exams ● College Career Preparedness (College Career Indicator %) ● % Students graduated ● Maintenance of low middle school dropout rates ● Maintenance of low high school dropout rates ● Expansion of K-8 live synchronous instruction courses aligned with CTE pathways ● State and local math and reading scores ● Student/parent belief in access to instructional resources necessary to align with state standard education ● % Students receiving interventions who demonstrate growth equivalent to one year or more in English Language Arts and Mathematics ● % Students with disabilities participating in math intervention programs ● % Teachers feeling equipped to transition their students to the next grade level band ● % English learners making progress toward English proficiency ● % English learners' participation in ELD and/or core synchronous instruction courses

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">ENGAGEMENT</p>	<p>In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth. (Reworded to include students and parents - LCAP required)</p> <p>CPSELs: 1, 2, 3, 4, 5, 6, 7</p>	<p>a. Increase opportunities for parents and students to connect with each other and with school leadership, fostering a sense of community and alignment with the school's mission and vision. (NEW-WASC driven)</p> <p>b. Develop purposeful pathways for growth and opportunities for professional development.</p> <p>c. Increase professional development for live instruction. (NEW-WASC driven)</p> <p>d. Develop a system to increase access and consistency for social and emotional resources and interventions. (NEW-WASC driven)</p>	<ul style="list-style-type: none"> ● Student/parent/staff satisfaction survey results related to community engagement, connectedness, and confidence in job performance ● % Credentialed teachers ● % School attendance rates ● % Chronic absenteeism ● % Suspension and/or expulsion rates ● Student/staff retention rate ● Pathway for advancement participation rates ● Increased number of professional development opportunities for all staff with a focus on live instruction ● % Student/parent/staff that feel informed about the social and emotional resources provided by Sage Oak ● Increased number of synchronous support groups and/or counselor-led groups
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">SMART LEARNING SYSTEMS</p>	<p>Leverage technologies, specifically Artificial Intelligence (AI), to enhance data-driven decision-making, automate routine operational processes, and provide personalized learning pathways for students, thereby establishing scalable systems that ensure long-term sustainability, promote academic growth, and increase operational efficiency. (Reworded to include AI and student focus)</p> <p>CPSELs: 1, 2, 3, 4, 5, 6, 7, 9</p>	<p>a. Evaluate, integrate, and optimize technology to streamline and automate operational processes and procedures.</p> <p>b. Implement AI-driven personalized learning strategies to maximize student learning</p>	<ul style="list-style-type: none"> ● Staff-to-student ratio ● Staff satisfaction survey results: improvements in work efficiency and satisfaction, and increased confidence in using AI tools to improve learning outcomes

Action Steps

Priority/Goal #1: STUDENT SUCCESS

To improve academic performance and College and Career Readiness for all students, we will implement comprehensive, grade-appropriate College and Career Readiness programs. This initiative will cultivate the confidence, skills, and spirit of innovation necessary for each student to confidently navigate their unique paths, enabling them to make a meaningful impact in their communities and the world.

Strategy A: Integrate career, community, and life skills into comprehensive K-12 pathways

Strategy B: Refine a personalized, data-informed multi-tiered system of support for all students

Strategy C: Improve math proficiency for students with disabilities by increasing their participation in synchronous math interventions.

Strategy D: Create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates.

Strategy E: Increase the percentage of students making progress toward proficiency as measured by the state language proficiency assessment and increase English learner reclassification rate by increasing synchronous instruction access.



Goal 1: Student Success

2023-24	2024-25	2025-26	2026-27
<p><u>K-12 College Career Pathways</u> Add new Oakschool classes that will support the building of future pathways; Add two art teachers to begin building the art pathway</p>	<p><u>K-12 College Career Pathways</u> Develop clear and cohesive pathways from middle school through high school for Art, Child Development, Sports Medicine, and Computer Science</p>	<p><u>K-12 College Career Pathways</u> Develop clear and cohesive pathways from elementary through high school for Art, Child Development, Sports Medicine, and Computer Science</p>	<p><u>K-12 College Career Pathways</u> Fully developed and cohesive pathways from elementary through high school in Art, Child Development, Sports Medicine, and Computer Science.</p>
	<p><u>College-Career Exploration (Leadership)</u> Equip the leadership team with knowledge and tools to understand students' interests, personalities, strengths, and work values. This understanding will enable leadership to support teachers in guiding students toward suitable career paths effectively.</p> <p>Continue to add Oakschool classes/school opportunities related to college-career exploration</p>	<p><u>College-Career Exploration (Teachers/Students)</u> Implement a college and career curriculum, such as Pathful, and utilize tools that help both students and teachers understand students' interests, personalities, strengths, and work values. This will assist in identifying suitable career options and will empower students and powers to make informed choices. Integrate interest inventories into high school college, career, and CTE courses. Additionally, administer College & Career Interest Inventories to Virtual Academy middle school students to foster early career awareness and planning.</p> <p>Continue to add Oakschool career exploration classes.</p>	<p><u>College-Career Exploration (Parents)</u> Refine the approach to improve and develop a comprehensive college/career curriculum by utilizing tools for students to understand their interests, personalities, strengths, and work values. Focus on helping students and parents grow in their confidence to support students in using their self-identified strengths, interests, and values to navigate various stages of the child's development. Emphasize the importance of making strong, self-directed choices that align with personal satisfaction and career congruence, as alignment between life satisfaction and career choice is crucial.</p> <p>Continue to add Oakschool career exploration classes.</p>
<p><u>College, Career & Service Field Trips</u> Increase the number of field trips that align with goal; Add two art teachers to add art field trips</p>	<p><u>College, Career & Service Field Trips</u> Integrate college/career field trips aligned with each CTE pathway from middle school through high school</p>	<p><u>College, Career & Service Field Trips</u> Integrate college/career field trips aligned with each CTE pathway from elementary school through high school</p>	<p><u>College, Career & Service Field Trips</u> Fully integrated college/career field trips from elementary through high school that align with established pathways</p>

<p><u>College, Career & Service Podcasts</u> Increase the number of podcasts that align with goal</p>	<p><u>College, Career & Service Podcasts</u> Maintain the number of podcasts that align with goal</p>	<p><u>College, Career & Service Podcasts</u> Maintain the number of podcasts that align with goal</p>	<p><u>College, Career & Service Podcasts</u> Maintain the number of podcasts that align with goal</p>
<p><u>High School CTE Pathways</u> Add Sports Medicine CTE Pathway; Further develop Child Development Pathway; Add computer science classes as building blocks for future Computer Science CTE pathway</p>	<p><u>High School CTE Pathways</u> Add Computer Science CTE Pathway</p>	<p><u>High School CTE Pathways</u> Add AI as a pathway within the Computer Science CTE Pathway</p>	<p><u>High School CTE Pathways</u> Evaluate whether there is a need for additional pathways or if the priority should be in growing the quality of existing pathways</p>
<p><u>High School Student Course Supports</u> Add a full time high school counselor focusing on college and career readiness to provide additional support beyond the students' Education Advisor</p> <p>In the student information system, align the course titles to ensure students are taking the right courses to reach college and career preparedness</p>	<p><u>High School Student Course Supports</u> Transfer responsibility of course assignments to the counselor (from the Education Advisors) so that we can continue to increase the alignment of courses with CCI alignment</p>	<p><u>High School Student Course Supports</u> Add a second high school counselor; increase caseload of EAs to fund if needed</p>	
<p><u>AVID</u> Implement Phase 2 in Virtual Learning Academy and high school</p>	<p><u>AVID</u> High School: Full AVID 9 elective implementation in high school as well as completing AVID certification for high school</p> <p>Virtual Learning Academy: Broaden college and career initiative with AVID, utilizing Pathful at the middle school level, completing StrengthsFinder surveys for all grade levels, and expanding college tour opportunities for middle school students. Enhance writing instruction by using a writing curriculum, professional development for teachers and systematic assessments</p>	<p><u>AVID</u> High School: Establish an AVID 10 elective</p> <p>Middle School: Establish an elective for 8th grade students focused on AVID strategies</p> <p>Personalized Learning Academy: Integrate AVID principles by equipping teachers and/or through Oakschool classes and parent training</p>	<p><u>AVID</u> High School: Establish an AVID 11 elective</p> <p>Middle School: Establish an elective for 7th grade students focused on AVID strategies</p> <p>Personalized Learning Academy: Further integrate AVID principles by equipping teachers and/or through Oakschool classes and parent training</p>

<p><u>Intervention</u> Add math intervention program to existing reading intervention program; Add math intervention teacher; Add yearlong math Oakschool courses</p>	<p><u>Intervention</u> Prioritize additional math and English Language Arts intervention teachers in the budget. Develop and train new Reading Specialists and Math Intervention teachers using evidence based practices</p>	<p><u>Intervention</u> Prioritize additional math and English Language Arts intervention teachers in the budget. Implement new intensive math classes for 4th and 5th grade students. Implement a new math curriculum in elementary intervention classes, and small groups math support for K-3rd grades.</p>	<p><u>Intervention</u> Prioritize additional math and English Language Arts intervention teachers in the budget</p>
<p><u>Increase Direct Instruction for Students in Math</u> Develop a plan for increasing direct instruction for students in math which might include incentivizing math Oakschool classes through curriculum/class at no cost to IFs; requiring students below grade level to take a live math class; hiring dedicated math teachers who do not have a caseload of students in order to increase the number of math classes we can provide.</p>	<p><u>Increase Direct Instruction for Students in Math</u> Implement the plan determined in Year 1: Expand live Oakschool math class offerings to 4th - 8th grades with no-cost to instructional funds to encourage full-year enrollment. Pilot a specialized power standard math class for TK/K and 6th grade students. Virtual Learning Academy and Oakschool: Identify the math power standards which will be used to improve instruction and student support</p>	<p><u>Increase Direct Instruction for Students in Math</u> Analyze the effectiveness of the previous year's plan to refine the plan as needed to maximize student success Oakschool: Prioritize teaching the power standards to maximize student success Virtual Learning Academy: Integrate power standards along with MasteryConnect assessments to increase student math achievement in math.</p>	<p><u>Increase Direct Instruction for Students in Math</u> Evaluate newly implemented plan, adjust as needed, maintain plan where successful for ongoing years Oakschool: Continue to prioritize teaching the power standards to maximize student success Virtual Learning Academy: Continue to refine the integration of power standards along with MasteryConnect assessments to increase student achievement in math in the Virtual Learning Academy.</p>
<p><u>Reduce Number of Students Using Below Grade Level Curriculum</u> Require teachers to meet with their regional mentor for discussion and approval for all general education students who are using curriculum below grade level; Track number of students using below grade level curriculum</p>	<p><u>Reduce Number of Students Using Below Grade Level Curriculum</u> Revisit and refine the plan. Consider requiring specific curriculum for special education students to ensure grade level exposure with built in scaffolding Continue to discuss with the regional mentor for approval for all curriculum</p>	<p><u>Reduce Number of Students Using Below Grade Level Curriculum</u> Reevaluate the effectiveness of the 24/25 plan to identify areas of success and those needing improvement, in order to refine the strategy for 25/26.</p>	<p><u>Reduce Number of Students Using Below Grade Level Curriculum</u> Fully implement the plan for reducing the number of students using below grade level curriculum, ensuring appropriate grade level exposure with necessary scaffolding for special education students</p>

	<p>below grade level. Consider collaborating with the curriculum coordinator on this task</p> <p>The regional mentor will consult with the assigned program specialist regarding students using curriculum more than two grade levels below</p>		
<p><u>Multilingual/English Learner Support</u> Add designated English Language Development teacher and classes; Add K-2 early literacy class</p>	<p><u>Multilingual/English Learner Support</u> Add additional teachers/classes, as needed based on enrollment.</p> <p>Support multilingual student access to synchronous instruction by implementing an equity tracker to monitor participation in school wide virtual classes.</p> <p>Provide professional development for all teachers relating to ELPAC testing and understanding the multilingual student.</p>	<p><u>Multilingual/English Learner Support</u> Add additional teachers/classes, as needed based on enrollment.</p> <p>Support multilingual student access to synchronous instruction by monitoring the equity tracker to ensure participation in schoolwide virtual classes.</p> <p>Continue professional development for all teachers relating to ELPAC testing and understanding the multilingual student.</p> <p>Add parent webinar and training on ELPAC and ELD instruction.</p>	<p><u>Multilingual/English Learner Support</u> Add additional teachers/classes, as needed based on enrollment. Support multilingual student access to synchronous instruction by monitoring the equity tracker to ensure participation in schoolwide virtual classes. Continue providing teacher training.</p>
<p><u>High School Special Education</u> Add two co-taught high school essentials English classes; Add co-taught Algebra and Pre-Algebra classes</p> <p>Research what credentials and/or training can cover high school special education core curriculum/classes</p>	<p><u>High School Special Education</u> Hire teacher(s) with credential/training who are qualified to teach the co-taught classes</p>	<p><u>High School Special Education</u> Continue to recruit and hire teacher(s) with credential/training who are qualified to teach the co-taught classes.</p>	<p><u>High School Special Education</u> Revisit and refine the plan based on programmatic needs.</p>

<p><u>Moderate/Severe Student Needs</u> Add TeachTown as a core curriculum for our moderate/severe students</p>	<p><u>Moderate/Severe Student Needs</u> Research moderate/severe programs of other similar schools to consider other ways to serve these students</p> <p>Increase collaboration between case manager and parent by creating a parent resource guide and adding regular consultations with the parent to discuss student needs</p>	<p><u>Moderate/Severe Student Needs</u> Provide ongoing TeachTown training to general education teachers and provide office hours to the general education teachers</p> <p>Maintain collaboration between case manager and parent by creating a parent resource guide and adding regular consultations with the parent to discuss student needs</p>	<p><u>Moderate/Severe Student Needs</u> Explore additional available components of TeachTown curriculum</p>
	<p><u>Students with Disabilities</u> Monitor % Students with disabilities participating in math interventions</p> <p>Research evidence-based math practices to use during SAI sessions</p> <p>Mild/Moderate teachers will attend professional development regarding evidence-based math practices</p>	<p><u>Students with Disabilities</u> Implement math evidence-based practices during service sessions</p> <p>Monitor student progress on school-wide assessments</p>	<p><u>Students with Disabilities</u> Continue to monitor student progress</p>

<p><u>Advanced Learner Programs (ALPs)</u> Oakschool: Add additional advanced learner classes;</p> <p>Field Trips: Add advanced learner field trips</p>	<p><u>Program for Advanced and Gifted Education (PAGE)</u> Add PAGE coordinator full time position</p> <p>Oakschool: Improve and increase classes and program offerings.</p> <p>Refine and improve PAGE identification process.</p>	<p><u>Program for Advanced and Gifted Education (PAGE)</u> Increase the number of students evaluated for PAGE. Improve middle school PAGE offerings.</p> <p>Oakschool: Add a middle school PAGE class.</p> <p>Add middle school honors courses; ensure staffing plan increases number of PLT+ teachers in order to do so</p> <p>Establish and implement project-based learning supplemental assignments for PAGE students.</p>	<p><u>Program for Advanced and Gifted Education (PAGE)</u> Continue to evaluate and improve the fully integrated program</p>
	<p><u>Socials</u> Host schoolwide career fair socials and expand the high school presence to an additional location</p> <p>Leverage events, such as socials and hangouts, to intentionally create spaces where parents and students can engage with one another and school leadership</p>	<p><u>Socials</u> Expand the high school presence to include all locations and include a showcase of different colleges.</p> <p>Leverage events, such as socials and hangouts, to intentionally create spaces where parents and student can engage with one another and school leadership</p>	<p><u>Socials</u> Continue to expand career fair socials and the showcase of different colleges</p> <p>Leverage events, such as socials and hangouts, to intentionally create spaces where parents can engage with one another and school leadership</p>
	<p><u>Middle School Program Expansion</u> Add a middle school coordinator full-time position; the middle school coordinator will be involved in professional learning communities, informal observations, and tailored professional development.</p> <p>Increase community-building through student hangouts, school offered parent support, increase support for</p>	<p><u>Middle School Program Expansion</u> Consider adding a middle school assistant principal if enrollment numbers support the need</p> <p>Implement professional development for middle school teachers focused on preparing middle school students for high school, emphasizing academic</p>	<p><u>Middle School Program Expansion</u> Continue to evaluate and improve the middle school program</p>

	<p>special education students who are transitioning from middle school to Sage Oak's high school program</p> <p>Develop strategic plan to transition the middle school from elementary to secondary in the 2025-26 school year including things such as creating middle school only</p>	<p>and social-emotional growth.</p> <p>Introduce middle school-specific activities and opportunities for interaction with high school students.</p> <p>Implement webinars for advanced/gifted middle school students</p>	
	<p><u>Data-Informed Articulation Process</u> Collaborate to develop a comprehensive plan to create a unified, data-informed articulation process that smoothly transitions students through each grade band while integrating critical feedback from graduates.</p> <p>Improve the 8th grade to high school transition process by including a special course for 8th graders and adding office hours with the middle school coordinator.</p> <p>Develop a cohesive plan to connect with our graduates and gather valuable data on their post-graduation experiences. Focus on understanding how the Sage Oak program supported them and identify areas for improvement. Use this data to drive program improvements.</p>	<p><u>Data-Informed Articulation Process</u> Execute the plan developed in year one of this strategy/action item.</p> <p>Continue reaching out to graduates and utilizing the information gathered to refine our programs.</p>	<p><u>Data-Informed Articulation Process</u> Execute the plan developed in the first year of this strategy/action item by consistently implementing and monitoring progress through the continuous cycle of improvement. This involves regularly assessing outcomes, identifying areas for enhancement, and making necessary adjustments to ensure ongoing effectiveness and alignment with strategic goals.</p> <p>Continue reaching out to graduates and utilizing the information gathered to refine our programs.</p>

Action Steps

Priority/Goal #2: ENGAGEMENT

In order to enhance student, parent, and staff engagement, we will establish an environment that fosters connectedness and professional growth.

Strategy A: Increase opportunities for parents and students to connect with each other and with school leadership, fostering a sense of community and alignment with the school's mission and vision.

Strategy B: Develop purposeful pathways for growth and opportunities for professional development.

Strategy C: Increase professional development for live instruction.

Strategy D: Develop a system to increase access and consistency for social and emotional resources and interventions.



Goal 2: Engagement

2023-24	2024-25	2025-26	2026-27
	<p><u>Leadership Academy</u> Develop and execute a leadership academy for leaders new to Sage Oak</p>	<p><u>Leadership Academy</u> Expand academy to aspiring leaders</p>	<p><u>Leadership Academy</u> Refine and improve the academy</p>
	<p><u>Staff Retention and Satisfaction</u> Use previous year data to set a goal specific to the needs of their department, with a focus on staff retention and satisfaction.</p>	<p><u>Staff Retention and Satisfaction</u> Use previous year data to set a goal specific to the needs of their department, with a focus on staff retention and satisfaction.</p>	<p><u>Staff Retention and Satisfaction</u> Use previous year data to set a goal specific to the needs of their department, with a focus on staff retention and satisfaction.</p>
<p><u>Teacher and Leadership Induction</u> Continue partnership under an MOU with Riverside County Office of Education for teacher induction</p> <p>Continue providing an internal coach for staff with preliminary administrative credentials</p>	<p><u>Teacher and Leadership Induction</u> Research what it would take to develop an internal teacher induction program</p>	<p><u>Teacher and Leadership Induction</u> Possible implementation of an internal teacher induction program</p>	<p><u>Teacher and Leadership Induction</u> Possible implementation of an internal teacher induction program</p>
	<p><u>Work Anniversary Program</u> Develop a work anniversary program, honoring the longevity of staff serving Sage Oak, such as 1 Year, 5 Year, 10 Year. Survey staff on how to celebrate longevity through the work anniversary program.</p>	<p><u>Work Anniversary Program</u> Implement appropriate staff ideas from previous year</p>	<p><u>Work Anniversary Program</u> Maintain the work anniversary program</p>

<p><u>Wellness Initiative</u> Provide walking Pads for staff that work on their computers throughout the day and at the Redlands office</p>	<p><u>Wellness Initiative</u> Implement a wellness stipend for all staff through a Flexible Spending Account. Survey staff on how to promote wellness and utilize health provider wellness stipend(s).</p>	<p><u>Wellness Initiative</u> Implement wellness offerings based on staff feedback from Year 2 Continue to survey staff on how to promote wellness and utilize health provider wellness stipend(s) and prepare the wellness offerings for 2026/27.</p>	<p><u>Wellness Initiative</u> Implement wellness offerings based on staff feedback from Year 3 Continue to survey staff on how to promote wellness and utilize health provider wellness stipend(s) and prepare the wellness offerings for 2027/28.</p>
	<p><u>Professional Development - Live Instruction</u> Implement evidence-based professional development for synchronous instructors; topics will be determined based on student needs as well as teacher feedback</p>	<p><u>Professional Development - Live Instruction</u> Consider increasing the number of evidence-based professional opportunities for synchronous instructors; Based on the data from year 1, consider building a full pathway of professional development for synchronous instructors</p>	<p><u>Professional Development - Live Instruction</u> Possibly implement a full pathway of professional development for synchronous instructors</p>
<p><u>Counseling Services</u> Align the work of our school counselors with the goal; send counselors to training on the role of the school counselor</p>	<p><u>Counseling Services:</u> Increase Oakschool counseling classes offered. Increase opportunities for parent/ guardian notification of counseling programs through parent information webinars and counselor newsletters.</p>	<p><u>Counseling Services:</u> Prioritize additional counselors in the budget. Continue parent/ guardian outreach through the website, newsletters and parent webinars.</p>	

<p><u>Authorizer Relationships</u> Visit each authorizer’s board meeting 7-10 times per year to provide Sage Oak updates and to learn more about what the authorizer is doing, maintain a positive partnership with each authorizer</p> <p>Send authorizer superintendents birthday and holiday cards</p> <p>Invite authorizer superintendents to be celebrated on our podcast</p> <p>In-person visits to authorizing superintendents regularly throughout the year</p>	<p><u>Authorizer Relationships</u> Visit each authorizer board meeting no less than six times during the school year.</p> <p>Continue to send cards.</p> <p>Continue attempts to invite authorizing superintendents to join our podcast.</p> <p>Visit each authorizing superintendent twice during the school year preferably in an informal setting.</p>	<p><u>Authorizer Relationships</u> Maintain plan</p>	<p><u>Authorizer Relationships</u> Maintain plan</p>
<p><u>Advocacy/Charter Development</u> Present at various professional association conferences</p> <p>Active involvement in political advocacy opportunities at local and state level</p> <p>Develop relationships with local and state legislative officials; invite them to Sage Oak events</p> <p>Develop relationships with the San Bernardino County Office of Education and Riverside Office of Education; Attend those county office board meetings</p>	<p><u>Advocacy/Charter Development</u> Submit proposals to present at APlus and CSDC.</p> <p>Maintain existing relationships with local government officials, especially for the end-of-year celebrations and awards.</p> <p>Continue to develop the relationship that’s begun with the Riverside County of Education with the goal of a county-wide charter petition.</p> <p>Continue to look for opportunities for expansion.</p> <p>Continue to hold biannual meetings with representatives from CCSA. The goal is to get a seat at the council table to represent schools like ours.</p>	<p><u>Advocacy/Charter Development</u> Maintain plan</p>	<p><u>Advocacy/Charter Development</u> Maintain Plan</p>

Goal 3: Smart Learning Systems

2023-24	2024-25	2025-26	2026-27
<p><u>Evaluation/integration team</u> Build a technical team consisting of designated members from the IT Department</p>	<p><u>Evaluation/integration team</u> Introduce quarterly review meetings to assess progress, challenges, and future steps.</p> <p>Develop a new job description for an individual who will maintain integrations, the user portal, custom tools, and data lake developments once they are launched</p>	<p><u>Evaluation/integration team</u> Maintain quarterly review meetings to assess progress, challenges, and future steps.</p>	<p><u>Evaluation/integration team</u> Maintain quarterly review meetings to assess progress, challenges, and future steps.</p>
<p><u>Systems audit</u> Interview all Sage Oak departments to understand school-wide systems</p> <p>Gain administrative access to all systems</p> <p>Understand what information flow exists for each system, identifying dependent and independent data</p> <p>Understand what work is being done on each system and how it is completed and documented</p> <p>Understand the reason systems are not fully used</p>	<p><u>Systems audit</u> Ensure effective cross-platform communication, enabling different systems to interact seamlessly to fill in gaps discovered by the audit</p> <p>Identify all data bridges between platforms</p> <p>Evaluate reducing systems used</p> <p>Train staff on elements of systems underutilized</p>	<p><u>Systems audit</u> Establish subject matter experts from each department to act as the support person for department tools and the Sage Oak user portal. These experts will serve as the first point of contact for support, ensuring ownership and accountability for maintaining updated information and ensuring systems run efficiently.</p>	<p><u>Systems audit</u> Implement advanced data analytics tools and develop dynamic dashboards to monitor and optimize system performance, track system utilization, and identify potential areas for further improvements.</p> <p>Schedule periodic training workshops to update staff on the latest system functionalities and best practices.</p>
<p><u>Projects integration and/or optimization</u> Investigate the fiscal efficiency of systems</p> <p>Create user buy-in for any proposed integration and/or optimization</p>	<p><u>Centralized Management System with Data Lake Integration</u> Develop and deploy a centralized management system (user portal) that provides a single dashboard linking documents and applications based on</p>	<p><u>Centralized Management System with Data Lake Integration</u> Leverage the central management system to include more content with an emphasis on user acceptance and adoption:</p>	<p><u>Centralized Management System with Data Lake Integration</u> Leverage the central management system to include more content with an emphasis on user acceptance and adoption:</p>

<p>Propose to the Director team a list of potential integration and/or optimization projects and set priorities</p>	<p>users' roles and departments. The dashboard will include organization-wide links to systems and applications, serving as a document hub with access to school-wide and departmental manuals and resources.</p>	<ul style="list-style-type: none"> ● Solicit user feedback. ● Enhance the user portal based on user feedback. ● Evaluate and update shortcuts based on departmental needs. ● Roll out training to address gaps in user knowledge. ● Expand Sage Oak data lake to include additional integrations. 	<ul style="list-style-type: none"> ● Solicit user feedback. ● Enhance the user portal based on user feedback. ● Evaluate and update shortcuts based on departmental needs. ● Roll out training to address gaps in user knowledge. ● Expand Sage Oak data lake to include additional integrations.
	<p><u>Custom Tool Development</u> Design various data integration tools to increase staff efficiency and support data-driven decision-making, accessed through the centralized management system:</p> <ul style="list-style-type: none"> ● Student information portal ● Teacher-student rostering assistance tool ● Special education assessment management system (AMS) ● Internal OPS purchase order (PO) data interchange ● Budget-to-actual system ● Secondary course alias search tool ● CalSTRS reporting automation ● Community provider (CP) parent and student rating and review page, similar to Yelp <p>Develop a plan for future development of various tools:</p> <ul style="list-style-type: none"> ● Inventory integration/virtual library ● Custom purchasing system to realize savings versus our existing annual subscription, integrating with a virtual library tool. 	<p><u>Custom tool development</u> Design various data integration tools to increase staff efficiency and support data-driven decision-making, accessed through the centralized management system:</p> <ul style="list-style-type: none"> ● Integrate an online lending library, department inventories, purchasing, and help desk inventories ● Create a custom purchasing system to realize savings compared to our existing annual subscription ● Launch a process to identify additional tool development opportunities and improve previously designed custom tools based on user feedback <p>Develop a plan for future development of a Virtual Library to be deployed in 2026-2027.</p>	<p><u>Custom tool development</u> Design various data integration tools based on the analysis from the previous year.</p> <p>Improve user interfaces within each custom tool based on user feedback</p> <p>Continue the process to identify additional tool development for future years</p>

<p><u>System and Process Documentation</u> Collect existing system and process documentation links</p> <p>Create and propose a standardized systems and document hub</p> <p>Establish organization-wide templates and processes to promote consistent operations across all departments, proposing standardized Standard Operating Procedures (SOP) template to use school-wide</p> <p>Explore the development of a Sage Oak ChatGPT, an AI-powered chatbot or virtual assistant, to provide teachers and staff with easy access to information and support.</p> <p>Define the scope and functionalities of the ChatGPT to address common inquiries, provide resources, and assist with system-related tasks.</p> <p>Collaborate with technology experts or vendors to develop and implement the Sage Oak ChatGPT effectively.</p> <p>Revisit the "where to go for support" chart and establish subject-matter experts</p>	<p><u>System and Process Documentation</u> Migrate system and process, including department manuals, to a common hub using organization-wide common templates</p> <p>Define clear access permissions for staff members and provide necessary training for each system.</p> <p>Create and propose a standardized systems and document hub</p> <p>Establish organization-wide templates and processes to promote consistent operations across all departments, proposing standardized Standard Operating Procedures (SOP) templates to use school-wide</p>	<p><u>System and Process Documentation</u> Monitor advancements in AI and documentation technology to identify potential upgrades for the Sage Oak ChatGPT and the documentation hub.</p> <p>Develop a roadmap for future enhancements, upgrades, and integrations, ensuring the systems remain cutting-edge and serve the evolving needs of the school</p> <p>Standardize the process for regular updates to documentation, ensuring it remains current and reflective of best practices.</p>	<p><u>System and Process Documentation</u> Integrate AI-powered documentation tools to streamline the creation and maintenance of system and process documentation.</p> <p>Roll out an enhanced version of the Sage Oak ChatGPT with expanded functionalities based on user feedback.</p>
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<p><u>AI Program for Students</u> Researching what AI curriculum/schools are out there; build a guiding team/committee</p>	<p><u>AI Program for Students</u> Develop an AI curriculum tailored to the needs of our students. Determine whether to integrate existing AI educational resources, develop our own curriculum, or collaborate with external educational organizations</p> <p>Utilizing the MagicStudent Platform in live synchronous instruction in order to provide a rich learning experience for our students and a streamlined approach to AI for our teachers.</p>	<p><u>AI Program for Students</u> Implement the AI curriculum across selected virtual pilot classes, gathering feedback from students and educators to refine the program.</p> <p>Establish a dedicated AI lab equipped with cutting-edge technology to facilitate hands-on learning experiences.</p> <p>Introduce foundational AI concepts across various subjects and grade levels to enhance students' understanding and interest in artificial intelligence, preparing them for advanced study and future career opportunities in technology.</p>	<p><u>AI Program for Students</u> Form partnerships with universities and tech companies to provide students with real-world AI application opportunities and mentorship programs.</p> <p>Create and implement standards-based AI courses that foster innovation, critical thinking, and problem-solving skills, preparing students for future careers in technology and artificial intelligence.</p> <p>Implement and optimize AI tools to provide customized educational pathways for students, ensuring scalability and long-term sustainability.</p>
	<p><u>SageOak.Ai</u> Expand the capabilities of the SageOak.Ai portal and the Sage Oak custom chatbots:</p> <ul style="list-style-type: none"> ● Integrate advanced functionalities for more comprehensive support and feedback ● Tailor the ChatBots for different departments ● Partner with AI technology experts to expand upon the AI tools used at Sage Oak 	<p><u>SageOak.Ai</u> Continue development of SageOak.Ai</p>	<p><u>SageOak.Ai</u> Continue development of SageOak.Ai</p>

Conclusion

In conclusion, Sage Oak's three-year strategic plan highlights our commitment to personalized and collaborative education, aiming to empower every student to lead a purposeful and productive life. By prioritizing student success, fostering engagement, and implementing smart learning systems, we are dedicated to creating an environment where both students and staff can excel. Our strategies integrate career and life skills, support professional development, and leverage technology to enhance learning outcomes. As we move forward, we remain true to our core values of Service, Accountability, Growth Mindset, and Excellence, striving to offer the best educational experience and preparing our students to make meaningful contributions to their communities and the world.

